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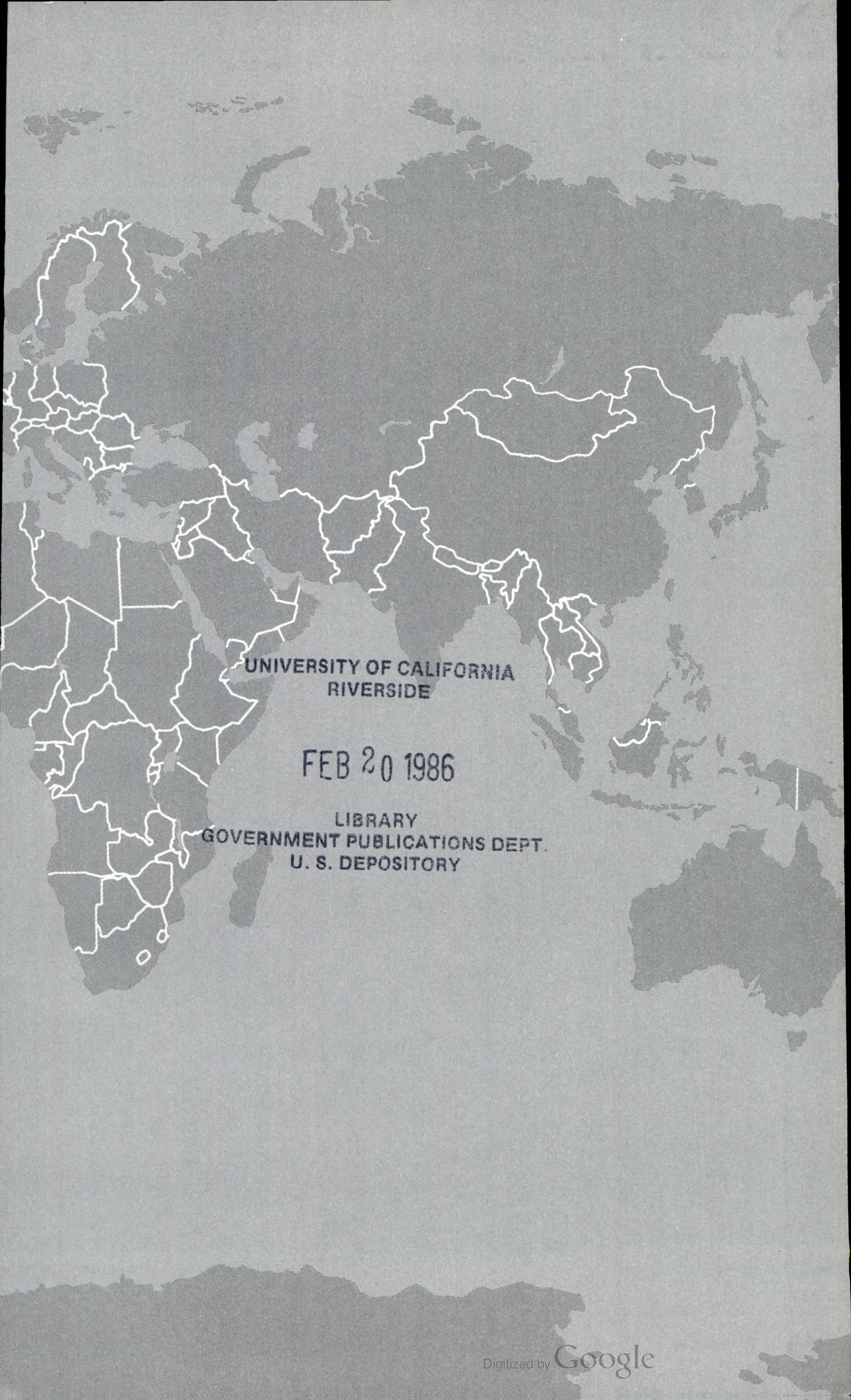

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a country study

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October 1984

On the cover: Representation of the Mexican coat of arms—an eagle with a snake in its mouth, standing on a cactus

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Foreword

This volume is one of a continuing series of books prepared by Foreign Area Studies, The American University, under the Country Studies/Area Handbook Program. The last page of this book provides a listing of other published studies. Each book in the series deals with a particular foreign country, describing and analyzing its economic, national security, political, and social systems and institutions and examining the interrelationships of those systems and institutions and the ways that they are shaped by cultural factors. Each study is written by a multidisciplinary team of social scientists. The authors seek to provide a basic insight and understanding of the society under observation, striving for a dynamic rather than a static portrayal of it. The study focuses on historical antecedents and on the cultural, political, and socioeconomic characteristics that contribute to cohesion and cleavage within the society. Particular attention is given to the origins and traditions of the people who make up the society, their dominant beliefs and values, their community of interests and the issues on which they are divided, the nature and extent of their involvement with the national institutions, and their attitudes toward each other and toward the social system and political order within which they live.

The contents of the book represent the views, opinions, and findings of Foreign Area Studies and should not be construed as an official Department of the Army position, policy, or decision, unless so designated by other official documentation. The authors have sought to adhere to accepted standards of scholarly objectivity. Corrections, additions, and suggestions for factual or other changes that readers may have will be welcomed for use in future new editions.

William Evans-Smith
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Preface

The completion of two *sexenios* (six-year terms of office) by two Mexican presidential administrations and major socioeconomic developments, sparked by Mexico's discovery of vast new oil deposits, necessitated a replacement for the 1975 *Area Handbook for Mexico*, which was reprinted in 1983 as *Mexico: A Country Study*. Like its predecessor, the present edition of *Mexico: A Country Study* is an attempt to treat in a compact and objective manner the dominant social, political, economic, and national security aspects of contemporary Mexican society. Sources of information included scholarly journals and monographs, official reports of governments and international organizations, foreign and domestic newspapers, numerous periodicals and newsletters, and interviews with individuals who have special competence in Mexican and Latin American affairs. Chapter bibliographies appear at the end of the book; brief comments on some of the more valuable sources appear at the end of each chapter. Measurements are given in the metric system, and a conversion table is provided to assist those readers who are unfamiliar with metric measurements (see table 1, Appendix). A Glossary follows the Bibliography; Table A, which lists the original Spanish names for many organizations and institutions referred to in the text by an English translation or by an acronym, immediately follows this Preface; Table B, a reference tool that highlights major Mexican historical events since independence, follows Table A.

Although there are many variations, Spanish surnames most often consist of two parts: the patrilineal name followed by the matrilineal. In the instance of Miguel de la Madrid Hurtado, for example, de la Madrid is his father's name; Hurtado, his mother's maiden name. In nonformal use, Mexicans very often drop the matrilineal name. Thus, after the first mention the president is referred to simply as de la Madrid. The patrilineal name is also used for filing in the Index and the Bibliography.

Some literature on Mexico refers to the Mexican Revolution as the period between 1910 and 1917. In this book, the period is referred to as the military phase of the Revolution, and the Mexican Revolution refers to an historical process that began in 1910 and continues into the present. This definition, as well as the practice of capitalizing "Revolution" in this context, is in conformity with official Mexican government practice and with much scholarly literature.

Table A. Selected Organizations and Institutions

Organization or Institution	Acronym
SOCIAL	
Educational Institutions	
Instituto Politécnico Nacional (National Polytechnic Institute)	IPN
Universidad Nacional Autónoma de México (National Autonomous University of Mexico)	UNAM
Health and Welfare Organizations	
Cámara Nacional de Hospitales (National Chamber of Hospitals)	n.a.
Comisión Mexicana de Asistencia a los Refugiados (Mexican Commission for Aid to the Refugees)	COMAR
Consejo Nacional de Población (National Population Council)	n.a.
Coordinación General del Plan Nacional de Zonas Deprimidas y Grupos Marginados (General Coordination of the National Plan for Economically Depressed Zones)	COPLAMAR
Instituto de Seguridad y Servicios Sociales para Trabajadores del Estado (Security and Social Services Institute for Government Workers)	ISSSTE
Instituto Mexicano del Seguro Social (Mexican Social Security Institute)	IMSS
Sistema Nacional para el Desarrollo Integral de la Familia (National System for the Integral Development of the Family)	DIF
ECONOMIC	
Banks and Finance	
Banco Comercial Mexicano (Commerce Bank of Mexico)	COMERMEX
Banco de México (Bank of Mexico)	n.a.
Banco Nacional de Comercio Exterior de México (National Foreign Commerce Bank of Mexico)	BANCOMEXT
Banco Nacional de Crédito Ejidal (National Bank of Ejidal Credit)	BNCE
Banco Nacional de Crédito Rural (National Bank of Rural Credit)	BANRURAL
Banco Nacional de México (National Bank of Mexico)	BANAMEX
Banco Nacional de Obras Públicas (National Bank of Public Works)	BANOBRAS

Table A. (continued)

Organization or Institution	Acronym
Bolsa Mexicana de Valores (Mexican Stock Exchange)	n.a.
Nacional Financiera (National Development Bank)	NAFINSA
Agriculture	
Centro de Investigaciones para el Mejoramiento de Maiz y Trigo (Center for Corn and Wheat Research)	CIMMYT
Compañía Nacional de Subsistencias Populares (National Company for Popular Sustenance)	CONASUPO
Instituto Mexicano de Café (Mexican Coffee Institute)	IMMECAFE
Instituto Nacional de Investigaciones Agrícolas (National Institute of Agricultural Research)	INIA
Programa Nacional Alimentaria (National Food Program)	PRONAL
Sistema Alimentario Mexicano (Mexican Food System)	SAM
POLITICAL	
Cabinet-level Offices	
Contraloría General (Comptroller General's Office)	n.a.
Departamento del Distrito Federal (Department of the Federal District)	n.a.
Secretaría de Agricultura y Recursos Hidráulicos (Secretariat of Agriculture and Hydraulic Resources)	n.a.
Secretaría de Comercio y Fomento Industrial (Secretariat of Commerce and Industrial Development)	n.a.
Secretariá de Comunicaciones y Transportes (Secretariat of Communications and Transport)	n.a.
Secretaría de Defensa Nacional (Secretariat of National Defense)	n.a.
Secretaría de Desarrollo Urbano y Ecología (Secretariat of Urban Development and Ecology)	n.a.
Secretaría de Educación Pública (Secretariat of Public Education)	n.a.
Secretaría de Energía, Minas, y Industria Paraestatal (Secretariat of Energy, Mines, and Parastatal Industry)	n.a.
Secretaría de Gobernación (Secretariat of Government)	n.a.
Secretaría de Hacienda y Crédito Público (Secretariat of Finance)	n.a.
Secretaría de Marina (Secretariat of the Navy)	n.a.
Secretaría de Pesca (Secretariat of Fisheries)	n.a.

Table A. (continued)

Organization or Institution	Acronym
Secretaría de Programación y Presupuesto (Secretariat of Programming and Budget)	n.a.
Secretaría de Reforma Agraria (Secretariat of Agrarian Reform)	n.a.
Secretaría de Relaciones Exteriores (Secretariat of Foreign Relations)	n.a.
Secretaría de Salubridad y Asistencia (Secretariat of Health and Public Assistance)	n.a.
Secretaría de Trabajo y Revisión Social (Secretariat of Labor and Social Welfare)	n.a.
Secretaría de Turismo (Secretariat of Tourism)	n.a.
Political Parties	
Coalición de Obreros, Campesinos, y Estudiantes del Istmo (Coalition of Isthmus Workers, Campesinos, and Students)	COCEI
Movimiento de Acción Política (Political Action Movement)	MAP
Movimiento de Acción y Unidad Socialista (Movement of Socialist Action and Unity)	MAUS
Partido Auténtico de la Revolución Mexicana (Authentic Party of the Mexican Revolution)	PARM
Partido de Acción Nacional (Party of National Action)	PAN
Partido Comunista de México (Mexican Communist Party)	PCM
Partido de la Revolución Mexicana (Party of the Mexican Revolution)	PRM
Partido del Pueblo Mexicano (Party of the Mexican People)	PPM
Partido Democrático Mexicano (Mexican Democratic Party)	PDM
Partido Mexicano de los Trabajadores (Mexican Workers' Party)	PMT
Partido Nacional Revolucionario (National Revolutionary Party)	PNR
Partido Popular Socialista (Popular Socialist Party)	PPS
Partido Revolucionario de los Trabajadores (Revolutionary Workers' Party)	PRT
Partido Revolucionario Institucional (Institutional Revolutionary Party)	PRI
Partido Socialista de los Trabajadores (Socialist Workers' Party)	PST
Partido Socialista Revolucionario (Revolutionary Socialist Party)	PSR
Partido Socialista Unificado de México (Unified Socialist Party of Mexico)	PSUM

Table A. (continued)

Organization or Institution	Acronym
Unión Nacional Sinarquista (National Sinarquist Union)	UNS
Labor Unions	
Bloque de Unidad Obrera (Labor Unity Bloc)	BUO
Central Nacional de Trabajadores (National Workers' Central)	CNT
Confederación de Trabajadores Mexicanos (Confederation of Mexican Workers)	CTM
Confederación General de Trabajadores (General Confederation of Workers)	CGT
Confederación Regional de Obreros Mexicanos (Regional Confederation of Mexican Workers)	CROM
Confederación Revolucionaria de Obreros y Campesinos (Revolutionary Confederation of Workers and Campesinos)	CROC
Confederación Revolucionaria de Trabajadores (Revolutionary Confederation of Workers)	CRT
Congreso de Trabajo (Congress of Labor)	CT
Federación de Obreros Revolucionarios (Federation of Revolutionary Workers)	FOR
Federación de Sindicatos de Trabajadores en el Servicio del Estado (Federation of Labor Unions of Workers in the Service of the State)	FSTSE
Frente Auténtico del Trabajo (Authentic Labor Front)	FAT
Sindicato de Telefonistas de la República Mexicana (Union of Telephone Workers of the Mexican Republic)	STRM
Sindicato de Trabajadores Mineros y Metalúrgicos de la República Mexicana (Union of Mining and Metallurgical Workers of the Mexican Republic)	STMMRM
Sindicato de Trabajadores Petroleros de la República Mexicana (Union of Oil Workers of the Mexican Republic)	STPRM
Sindicato Mexicano de Electricistas (Mexican Union of Electricians)	SME
Sindicato Único de Trabajadores de la Industria Nuclear (Union of Workers of the Nuclear Industry)	SUTIN
Other Interest Groups	
Asociación Nacional de Cosecheros (National Harvesters' Association)	n.a.
Cámara Nacional de la Industria de Transformación (National Chamber of Manufacturing Industries)	CANACINTRA
Comité Nacional pro Defensa de Presos, Perseguidos Desaparecidos, y Exiliados (National Committee in Defense of Prisoners, Persecuted, Disappeared, and Political Exiles)	CNDPPDE

Table A. (continued)

Organization or Institution	Acronym
Confederación de Cámaras de Industria (Confederation of Chambers of Industry)	CONCAMIN
Confederación de Cámaras Nacionales de Comercio (Confederation of National Chambers of Commerce)	CONCANACO
Confederacíon Nacional Campesina (National Campesino Confederation)	CNC
Confederacíon Nacional de la Pequeña Propiedad Agrícola (National Confederation of Small Farm Properties)	n.a.
Confederacíon Nacional de Organizaciones Populares (National Confederation of Popular Organizations)	CNOP
Consejo Coordinador Empresarial (Coordinating Council for the Private Sector)	CCE
MILITARY	
Police Organizations	
Brigada Blanca (White Brigade)	n.a.
Dirección Federal de Seguridad (Federal Directorate of Security)	DFS
Dirección General de Policía y Tránsito (General Directorate of Police and Traffic)	DGPT
División de Investigaciones para La Prevención de Delincuencia (Division of Investigations for the Prevention of Delinquency)	DIPD
Policía Judicial del Distrito Federal (Federal District Judicial Police)	n.a.
Policía Judicial Federal (Federal Judicial Police)	n.a.
Secretaría de Protección y Vialidad (Protection and Transit Secretariat)	SPV
Servicios Migratorios Mexicanos (Mexican Immigration Service)	n.a.
Guerrilla/Terrorist Organizations	
Asociación Cívica Nacional Revolucionaria (National Revolutionary Civic Association)	ACNR
Fuerzas Revolucionarias Armadas del Pueblo (People's Armed Revolutionary Forces)	FRAP
Liga Comunista 23 de Septiembre (Twenty-Third of September Communist League)	n.a.
Movimiento de Acción Revolucionaria (Revolutionary Action Movement)	MAR
Partido de los Pobres (Party of the Poor)	n.a.
Partido Proletario Mexicano (Mexican Proletarian Party)	PPM
Unión del Pueblo (People's Union)	n.a.

Table A. (continued)

Organization or Institution	Acronym
Military Schools	
Centro de Estudios Superiores Navales (Center of Superior Naval Studies)	n.a.
Colegio de Defensa Nacional (National Defense College)	n.a.
Colegio del Aire (Air College)	n.a.
Escuela Superior de Guerra (Superior War College)	n.a.
Heróica Escuela Naval Militar (Heroic Naval Military School)	n.a.
Heróico Colegio Military (Heroic Military College)	n.a.
Other Security-Related Organizations	
Banco National del Ejército, Fuerza Aérea, y Armada (National Bank of the Army, Air Force, and Navy)	BANJERCITO
Brigada de Fusilero Paracaidistas (Airborne Brigade)	n.a.
Campaña Contra la Producción y Comercialización de Estupefacientes (Campaign against Production and Trafficking of Narcotics)	n.a.
Cuerpo de Defensa Rural (Rural Defense Corps)	n.a.
Dirección General de Industria Militar (General Directorate of Military Industry)	n.a.
Fuerza Aérea Mexicana (Mexican Air Force)	FAM
Instituto de Seguro Social para las Fuerzas Armadas Mexicanas (Mexican Armed Forces Social Security Institute)	ISSFAM
Instituto Técnico de Capacitación de la Procuraduría General de la República (Technical Training Institute of the Attorney General)	n.a.
Procuraduría General (Attorney General)	n.a.
Servicio Militar Nacional (National Military Service)	SMN

n.a.—not applicable.

Table B. Chronology of Important Events, 1810–1982

Dates	Events
1810	Grito de Dolores (Cry of Dolores)—Miguel Hidalgo y Costilla's call for independence on September 16.
1811	Hidalgo executed on July 31. Independence movement then led by José María Morelos.
1815–20	Morelos executed December 22, 1815. Independence movement degenerates into sporadic guerrilla fighting. Vicente Guerrero most important guerrilla leader.
1821	Colonization grant given to Moses Austin to settle Texas. Plan of Iguala proclaims Mexican independence on February 24. Augustín de Iturbide and Spanish envoy Juan O'Donojú sign Treaty of Córdoba on September 27 recognizing Mexico's independence; treaty not honored by Spanish government, however.
1822	Army of the Three Guarantees occupies Mexico City under Iturbide's command on May 18. Iturbide becomes emperor of Mexico as Agustin I. Republic proclaimed by Antonio López de Santa Anna Pérez de Lebrón on December 1.
1823	Plan of Casa Mata put forth on February 1, leading to Iturbide's abdication mid-month. Guadelupe Victoria becomes first Mexican president on October 4. After Stephen F. Austin's colonization grant is confirmed, he proceeds to settle Texas.
1824	Federal republican government is established under new constitution; Victoria becomes president.
1828	Santa Anna repels Spain's attempt to regain control of Mexico in July. Guerrero abolishes slavery in September as means of discouraging migration of United States Southerners to Texas.
1830	Political disturbances. Rebellion drives Guerrero from presidency. Immigration to Texas prohibited but not enforced.
1831	Guerrero arrested and executed.
1833–34	Santa Anna elected president on December 1, 1833. Dictatorship established April 26, 1834. End of first liberal reforms. Tithes abolished.
1835–36	Texas pioneers seek independence from Mexico on November 7, 1835, achieving it in March 1836. Santa Anna defeated and forced to recognize independence of Texas. Spain and Vatican recognize Mexican republic in 1836.
1837	Anastasio Bustamante becomes president, initiating a process of centralization.
1838	French intervention at Veracruz. Santa Anna's victory.
1841	Conservative rebellion against Bustamante. Santa Anna's dictatorship.
1842	Santa Anna retires to his hacienda and leaves government to Nicolás Bravo.
1843	Santa Anna chosen as president of Mexico.
1844	Santa Anna forced into exile.
1845	Santa Anna returns to Mexico. Annexation of Texas by United States.
1846	Beginning of Mexican-American War. Mexico severs diplomatic relations with United States.

Table B. (continued)

Dates	Events
1847	United States occupation of Veracruz on March 9 and Mexico City on September 13.
1848	Treaty of Guadalupe Hidalgo ends Mexican-American War on February 2. Texan independence confirmed. United States annexes territories of Upper California and New Mexico.
1853	Santa Anna returns to Mexico and becomes president on November 6. Sells additional territory to United States under Gadsden Purchase.
1854	Triumph of Plan of Ayutla under leadership of Benito Juárez.
1855	Completion of first road connecting Pacific and Gulf coasts. Santa Anna resigns in August. Juárez Law of November 13 ends *fueros* (privileges) enjoyed by military and clergy.
1856	Enactment of Lerdo Law on June 26 curtails properties held by civil and religious corporations.
1857	Constitution of 1857, promulgated on February 5, incorporates previous laws and establishes civil registry.
1858–60	War of the Reform between conservatives/clericalists and liberals engulfs country in three years of bitter struggle. Liberal victory at San Miguel Calpulalpán on December 24, 1860. Juárez promulgates Reform Laws on December 28, establishing nationalization of ecclesiastical properties without compensation, as well as suppression of religious orders.
1861	War of the Reform ends January 1. Moratorium on foreign debt payments on July 17. Tripartite agreement for intervention signed by Britain, France, and Spain. Landing at Veracruz on December 17 by troops from these three nations.
1862	French intervention and defeat at Puebla on May 5.
1863	French enter Puebla on May 17, then Mexico City on June 7. Juárez forced to abandon the city.
1864	Ferdinand Maximilian Joseph reign begins. He confirms Reform Laws, except for those that refer to indigenous communities.
1866	French troops depart in November.
1867	Juárez offensive takes place in February. Maximilian surrenders at Querétaro on May 15 and is executed on June 19. Juárez moves his government to Mexico City on July 15, becomes president in December, and then leads Restoration.
1872	Death of Juárez on July 18. Sebastián Lerdo de Tejada inaugurated president.
1873	Reform Laws incorporated into Mexican constitution; separation of church and state.
1876	Porfirio Díaz leads rebellion on platform of "no reelection" and starts his presidential career, which lasts for 34 years (except 1880–84), of "order and progress." Modernization of finances, trade, industry, and mining sector. Political ideology based on positivism.
1880	Favorable concessions to United States railroad companies; railroad boom.
1880–84	Presidency of Manuel González.
1884	Reform of mining code. Subsoil ownership given to landowners. Reelection of Díaz.

Table B. (continued)

Dates	Events
1888	Constitution changed to allow Díaz to succeed himself.
1890	United States investments in mining sector in Monterrey.
1892	Díaz dedicates textile factory at Río Blanco in Orizaba.
1904	Constitution changed to allow for six-year presidential term.
1905	International and economic fiscal conditions lead to changes in Mexican monetary system and to internal economic problems.
1906	Proclamation against Díaz issued by the liberals in St. Louis, Missouri.
1906–07	Economic crisis. Strikes by textile and mining workers at Cananea and Río Blanco.
1908	Díaz states his intention of not seeking reelection in interview published in January. Francisco I. Madero publishes *The Presidential Succession of 1910* in December.
1910	Celebrations of Mexico's 100 years of independence. Seventh re-election of Díaz. Madero's Plan of San Luis Potosí (October 5). Rebellion breaks out in north and in Puebla.
1911	Rebellion spreads throughout Mexico. After attack on Ciudad Juárez on May 9, Díaz resigns May 25 and is exiled to France. Madero returns in triumph to Mexico City and is elected to presidency on October 15. Zapata publishes Plan of Ayala on November 25, demanding quick reforms.
1912	Pascual Orozco rebels against Madero on March 3 and publishes agrarian plan on March 25. Victoriano Huerta's troops crush rebellion (May-August). Huerta exiled to France on July 14. Zapata and Francisco (Pancho) Villa enter Mexico City in November. Venustiano Carranza establishes constitutional government at Veracruz.
1913	Ten Tragic Days (February 8–18). Madero overthrown by coup d'état staged by Felix Díaz and Huerta. Madero and José María Pino Suárez (vice president) assassinated on February 21. Plan of Guadalupe issued in March by Carranza, Villa, and Álvaro Obregón, who lead northern rebellion while Zapata remains in charge of southern rebel forces. Huerta's presidency and Congress dissolved on October 10.
1914	United States troops land at Veracruz on April 27. Huerta defeated and forced into exile.
1915	Obregón wins battle at Celaya against Villa in April; Villa continues to fight, and he raids United States border towns for next five years. Carranza recognized by United States in October as chief of government forces.
1916	General John J. "Blackjack" Pershing's punitive expedition pursues Villa and provokes bitterness between Mexico and United States.
1917	Constitution of 1917 promulgated. Carranza elected president in March. Hydrocarbons declared national property.
1918	Regional Confederation of Mexican Workers (Confederación Regional de Obreros Mexicanos—CROM), quasi-official workers' confederation, founded.
1919	Zapata assassinated on April 10.

Table B. (continued)

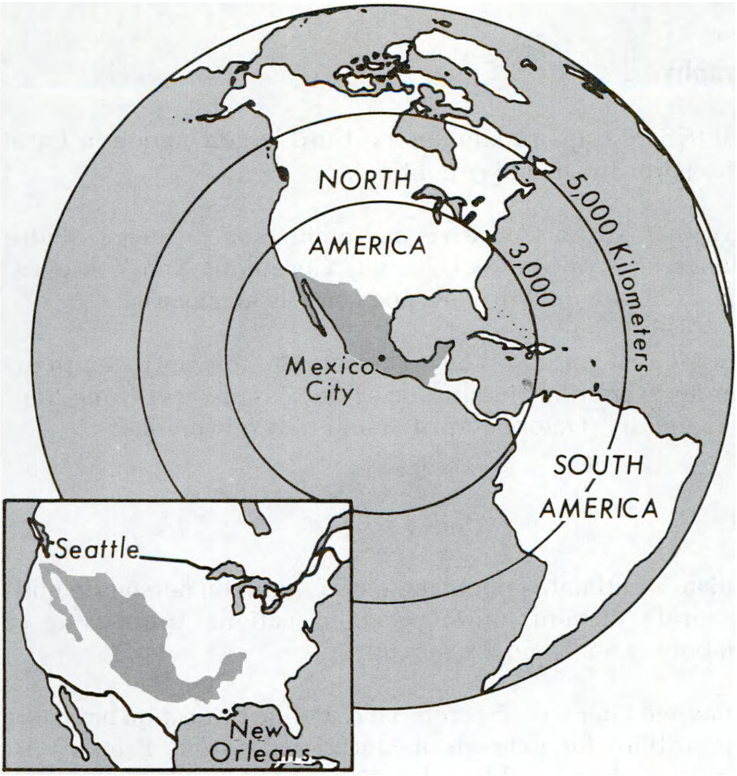
Dates	Events
1920	Obregón rebels. Carranza dies. Obregón elected president on December 1 and allies himself with CROM. Villa "retires."
1921	José Vasconcelos becomes secretary of education and starts literacy campaign.
1923	United States recognizes Obregón government. Villa assassinated.
1924	Plutarco Elías Calles elected president.
1926	Anticlerical policies spark Cristero Rebellion.
1927	Constitution of 1917 amended to extend presidential term to six years.
1928	Calles succeeded by Obregón, who is assassinated on July 17, before taking office. Calles, who is to remain political strongman through 1935, chooses Emilio Portes Gil as president in December.
1929	Cristero Rebellion suppressed. Agreement between church and state leads to reopening of churches. Founding of the official political party—National Revolutionary Party (Partido Nacional Revolucionario—PNR). Pascual Ortiz Rubio elected, but Calles remains as recognized political boss.
1930	Portes Gil succeeded by Ortiz Rubio as president.
1932	Ortiz Rubio resigns; Abelardo Rodríguez chosen to complete term. Beginning of new wave of church-state hostilities and reduction of the number of clergy allowed to officiate; hostilities last three years.
1934–40	Lázaro Cárdenas presidency. Forced exile of Calles (1936). Cárdenas begins socialist policies. Agrarian reform establishes *ejidos* (see Glossary) and collectivization. Confederation of Mexican Workers (Confederación de Trabajadores Mexicanos—CTM) replaces CROM as representative of Mexican workers. Official party renamed Party of the Mexican Revolution (Partido de la Revolución Mexicana—PRM); includes representatives from all sectors of society. Nationalization of oil industry in 1938. Freedom of the press, end of religious strife, and asylum policies for foreign political refugees.
1940–46	Manuel Ávila Camacho presidency. Mexico joins Allies in declaring war on Axis powers in 1942. PRM reorganized to provide wider representation and renamed Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI). *Bracero* (migrant Mexican worker) agreement established between Mexico and United States in 1942.
1946–52	Miguel Alemán Valdés presidency. Final payment made by Mexico to United States oil companies for expropriations. Industrialization, public works, and creation of a new campus for the National Autonomous University of Mexico (Universidad Nacional Autónoma de México—UNAM). Urban growth at expense of agrarian improvements. Per capita agricultural production reaches pre-Revolutionary levels. In 1950 more than 50 percent of Mexican population literate.
1952–58	Adolfo Ruiz Cortines presidency. Women's suffrage extended to national level. Beginning of political stability through appointment of PRI candidates to presidency. In 1954 United States embarks on deportation of "illegal" Mexican workers.

Table B. (continued)

Dates	Events
1958–64	Adolfo López Mateos presidency. Increased foreign investments in Mexico and control of the economy by foreign (mainly United States) interests. Final repayment made in 1962 to British companies for expropriated oil properties. Purchase and nationalization of utility concessions beginning in 1960. Mexico-United States agreement on Chamizal boundary dispute in 1963. Land redistribution policies and increased agricultural production. Greater participation of minority parties in political process.
1964–70	Gustavo Díaz Ordaz presidency. Termination of *bracero* program in 1964. Foreign firms operating in Mexico on grand scale: of an estimated 2,000 firms, 242 were subsidiaries of United States multinational corporations. Student unrest leads to Tlatelolco Massacre on October 2, 1968.
1970–76	Luis Echeverría Álvarez presidency. Emphasis by Mexico on participation in Third World policies against imperialism and foreign economic control. Oil boom in Chiapas and Tabasco in 1974. Tourist boycott against Mexico in response to Mexico's definition of "Zionism as a form of racism" at the United Nations in 1975. Economic difficulties. Devaluation of the peso (for value of the peso—see Glossary) in 1976.
1976–82	José López Portillo y Pacheco presidency. Mexico becomes fourth largest producer of oil in 1981. Peso devalued in 1982. Mexico becomes one of world's leading debtor countries. Controls established on currency and private banks nationalized on September 1, 1982. Political reform, leading to increase of minority party representation in Chamber of Deputies by proportional representation system. President Miguel de la Madrid Hurtado inaugurated on December 1, 1982.

Source: Based on information from François Chevalier, *L'Amérique Latine de l'indépendance à nos jours*, 44, Paris, 1977, 84–116; and Charles C. Cumberland, *Mexico: The Struggle for Modernity*, London, 1968, 324–33.

Country Profile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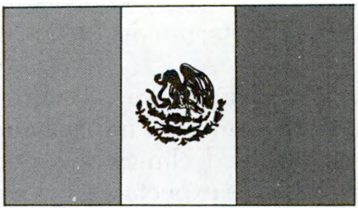
New Orleans



Country

Formal Name: United Mexican States (Estados Unidos Mexicanos).
Short Form: Mexico.
Term for Citizens: Mexican(s).
Capital: Mexico City (called México or Ciudad de México in country).

Flag: Vertical bands of green, white, and red with centered national emblem.

Geography

Size: 1,978,000 square kilometers--third largest nation in Latin America (after Brazil and Argentina).

Topography: Various massive mountain ranges (Sierra Madre Occidental, Sierra Madre Oriental, Cordillera Neo-Volcánica, and Sierra Madre del Sur); lowlands largely along coasts.

Climate: Great variations owing to considerable north-south extension and variations in altitude. Two seasons: wet (June-September) and dry (October-April). Generally low rainfall.

Society

Population: Estimated population of 77.7 million persons in mid-1984--world's eleventh most populous nation. Annual rate of growth between 2.5 and 2.6 percent.

Education and Literacy: Secretariat of Public Education has overall responsibility for all levels of educational system. Primary education compulsory; public education free. Government distributes free textbooks and workbooks to all primary schools. Official illiteracy rate in 1980 was 17.1 percent.

Health and Welfare: Health care personnel and facilities generally concentrated in urban areas; care in rural areas confined to understaffed clinics operated mostly by medical graduate students. Life expectancy in 1984 estimated at 66 years. Infant mortality 55 per 1,000 live births. Leading causes of death infections, parasitic diseases, and respiratory and circulatory system failures.

Language: Spanish official language, spoken by all but members of isolated ethnic minority groups. English and French sometimes spoken among business elites and small upper class.

Ethnic Groups: Predominantly mestizo society. 55 distinct, mostly small, Indian societies in Mexico during mid-1980s.

Religion: About 90 percent of population Roman Catholic, according to 1980 census. Protestants (nearly 4 percent) ranked second. Number of Protestants increased dramatically during 1960s and 1970s, especially in southern states.

Economy

Gross Domestic Product (GDP): Equivalent to US$117.2 billion in 1983; approximately US$1,550 per capita. Economy had sustained rapid growth since 1940s, but by 1982 rising budget deficits, world oil glut, and mounting foreign debt required contraction and austerity for near future.

Agriculture: Contributed 8 percent of GDP in 1983. Main crops for domestic consumption corn and beans. Leading agricultural exports coffee, cotton, vegetables, fruit, livestock, and tobacco.

Industry: Contributed 34 percent of GDP in 1983. Industrialization increased rapidly after 1940. By 1980s large and diversified industrial base located largely in industrial triangle of Mexico City, Monterrey, and Guadalajara. Most industrial goods produced, including automobiles, consumer goods, steel, and petrochemicals. World's fourth largest producer of petroleum and ranked among leading five producers of 14 nonfuel minerals.

Exports: US$21.4 billion in 1983. Manufactured exports industrial food products, textiles, chemicals, machinery, and steel. Other important export items metals and minerals, livestock, fish, and agricultural products. Major exports to United States petroleum, automotive engines, silver, shrimp, coffee, and winter vegetables.

Imports: US$7.7 billion in 1983. Main imports agricultural products, livestock, fish products, minerals, textiles, chemicals, and capital goods. Leading imports from United States corn, sorghum, soybeans, sunflower seeds, motor vehicle parts, automatic data processing parts, and paper and paperboard.

Balance of Payments: In 1983 balance on current account positive and balance on capital account negative. Large foreign debt and substantial debt service payments required payment constraint and continued austerity during 1984 and 1985.

Exchange Rate: Dual exchange rate in effect during 1983. Controlled rate averaged 110.25 pesos per US$1; free market rate averaged 148.63 pesos per US$1. Both exchange rates subject to sliding depreciation scale of 13 centavos per day during 1983 and 1984.

Fiscal Year: Same as calendar year.

Rate of Inflation: 99 percent in 1982; 81 percent in 1983.

Transportation: In 1980s Mexico had extensive transportation network consisting of more than 200,000 kilometers of roads, of which 67,000 kilometers paved, more than 80,000 kilometers rural roads, and remainder state and local unpaved roads. About 20,000 kilometers of railroads; some 30 ocean ports, 13 of which served international traffic; about 50 airports capable of handling medium- or large-sized aircraft; and more than 20,000 kilometers of pipelines for crude oil, refined products, and natural gas.

Government and Politics

Government: Constitution of 1917 in force in 1984. Formally a federal republic, although federal government dominates governments of 31 states and Federal District. Central government power concentrated in president, who directs activities of numerous agencies and state-owned business enterprises. Bicameral legislature (64-member Senate and 400-member Chamber of Deputies) relatively weak. Federal judiciary headed by Supreme Court of Justice. State governments headed by elected governors; unicameral legislatures and state courts subordinate to federal courts. Federal District governed by regent appointed by president; 2,359 local governments headed by elected municipal presidents and municipal councils.

Politics: Authoritarian system governed by president, who cannot be reelected to another six-year term. Major political organization Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI), which incorporates peasant groups, labor unions, and many middle-class organizations within its ranks. Many opposition parties have had limited electoral success; largest is the conservative Party of National Action (Partido de Acción Nacional—PAN). Direct elections at regular intervals; rule of no reelection applies to most offices. Election by majority vote, except for 100 seats in Chamber of Deputies reserved for opposition parties chosen by proportional representation. Extensive participation by interest groups and labor unions in government and PRI affairs.

Foreign Relations: Major attention devoted to United States. Trade and immigration along shared border subjects of continuing negotiations. Foreign policy traditionally based on international law; nonintervention the major principle. Widely active in hemispheric affairs, including good relations with Cuba and Nicaragua and participation in Contadora Group.

International Agreements and Memberships: Party to Inter-American Treaty of Reciprocal Assistance (Rio Treaty). Membership in international organizations includes Organization of American States and its specialized agencies, United Nations and its specialized agencies, Latin American Alliance for Economic Development, and Latin American Economic System.

National Security

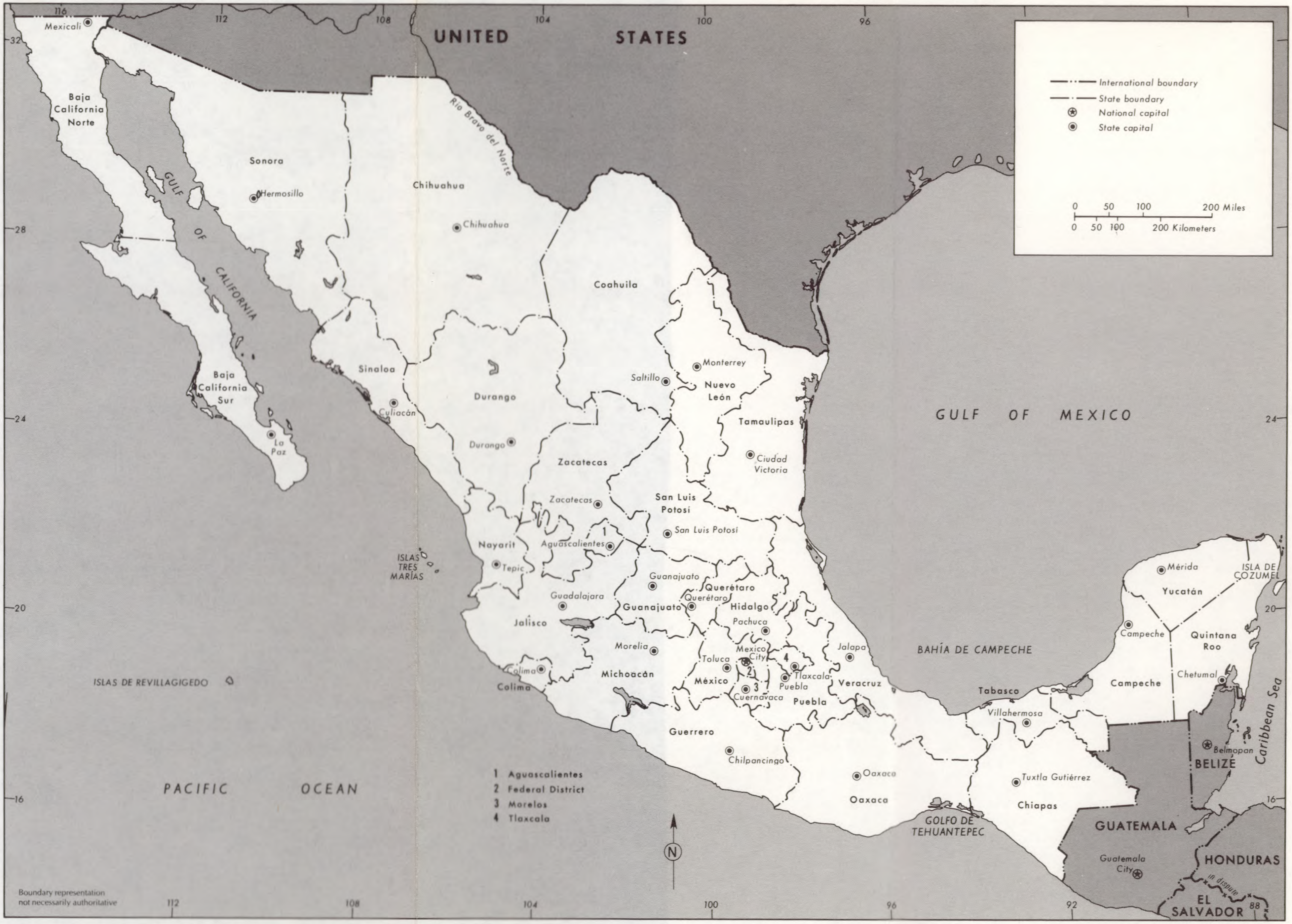
Armed Forces: Total strength in 1984 between 120,000 and 125,000 volunteer, active-duty personnel. Army, 92,500 to 94,500; air force, 5,000 to 5,500; and navy (including naval aviation and marines), 22,500 to 25,000. Conscripts, selected by lottery for National Military Service, numbered approximately 250,000 annually, although not formally inducted into armed forces. Women serving in armed forces had same legal rights and duties as men but in practice were not eligible to serve in combat positions, to be admitted to service academies, or to be promoted beyond rank equivalent of major general in United States armed forces.

Military Units: For army personnel commanded by Secretariat of National Defense, country divided into nine military regions with 36 military zones. Sixty-five independent garrison battalions distributed among zones in early 1984. Military zones usually assigned at least two infantry battalions composed of some 300 troops each; some zones also assigned one of 28 cavalry regiments or one of three artillery regiments. Remaining six infantry battalions assigned to duty with one of five brigades—largest formation in Mexican armed forces—stationed near Mexico City. Brigades included elite Presidential Guards Brigade, Second Infantry

Brigade, Third Infantry Brigade, Military Police Brigade, and Airborne Brigade. Personnel assigned to air force also within command structure of Secretariat of National Defense, distributed among air base installations throughout country, including facilities at Acapulco, Ciudad Ixtepec, Cozumel, Ensenada, Mérida, and Zapopán. Principal air base, Military Air Base Number 1, located at Santa Lucía in state of México. Personnel under command of Secretariat of the Navy assigned to one of 17 naval zone installations located in each coastal state or to one of five naval air stations.

Equipment: Under modernization program of late 1970s, armed forces began to replace aging World War II-vintage equipment. Highlight of recent acquisitions was 1982 purchase from United States of 12 F-5 Tiger II supersonic fighters. Attention also given to development of domestic military industry. Mexican navy benefited significantly in terms of new vessels—most domestically built. Plans for additional acquisitions from abroad between 1982 and 1984 constrained by country's economic problems.

Police: Main investigative body of police forces Federal Judicial Police. By mid-1984 numbered at least 1,500 and had received authorization to expand considerably. State judicial police forces complemented federal body in enforcing state laws. Likewise, judicial police force existed for Federal District. Federal Directorate of Security, having estimated 2,000 personnel in mid-1984 and generally referred to as government's "political police," responsible for investigations into matters affecting national security. Protection and Transit Secretariat--known as General Directorate of Police and Traffic prior to mid-1984--major Mexico City police force; in July 1983 employed some 27,000 personnel. By mid-1984, possibly in response to growing incidence of violent crime in Mexican capital, had taken on an increasingly militarized nature; commander, appointed in April 1983, an army general.


UNITED STATES
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Río Bravo del Norte
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GULF OF CALIFORNIA
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Coahuila
Saltillo
Monterrey
Nuevo León
Tamaulipas
Ciudad Victoria
Sinaloa
Culiacán
Baja California Sur
La Paz
Durango
Durango
Zacatecas
Zacatecas
San Luis Potosí
San Luis Potosí
Nayarit
Tepic
Aguascalientes
ISLAS TRES MARÍAS
Guadalajara
Jalisco
Guanajuato
Guanajuato
Querétaro
Querétaro
Hidalgo
Pachuca
Morelia
Michoacán
Colima
Colima
Toluca
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México
Cuernavaca
Tlaxcala
Puebla
Puebla
Jalapa
Veracruz
Guerrero
Chilpancingo
Oaxaca
Oaxaca
GULF OF MEXICO
BAHÍA DE CAMPECHE
Tabasco
Villahermosa
Mérida
Yucatán
ISLA DE COZUMEL
Campeche
Campeche
Quintana Roo
Chetumal
Tuxtla Gutiérrez
Chiapas
GOLFO DE TEHUANTEPEC
Belmopan
BELIZE
Caribbean Sea
GUATEMALA
Guatemala City
HONDURAS
in dispute
EL SALVADOR
ISLAS DE REVILLAGIGEDO
PACIFIC OCEAN
1 Aguascalientes
2 Federal District
3 Morelos
4 Tlaxcala
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Boundary representation not necessarily authoritative

Figure 1. Administrative Divisions and Capitals, 1984

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Introduction

DESPITE MEXICO'S PROXIMITY to the United States—bordering the southwestern states of California, Arizona, New Mexico, and Texas—and the visits of nearly 4 million United States citizens to Mexico annually, this neighbor to the south is often viewed through misperceptions and stereotypes. Impressions that it is a hot, dry, and rural nation are belied, for example, by icy mountain peaks, lush jungles and agricultural regions, and a capital city that, by the year 2000, may well be the largest city in the world. Perceptions that it is a poor nation are belied by the fact that in 1983 its economic output was the fifteenth highest in the world. In fact, Mexico is an extremely diverse nation; its complexity spans its history, society, economy, political life, foreign relations, and security concerns.

The importance of an accurate understanding of Mexico by the people of the United States was increasing dramatically during the second half of the twentieth century. Perhaps the most visible evidence of this was demographic in nature. After World War II the pace of Mexican migration into the United States picked up significantly, and by 1984, according to United States Bureau of the Census estimates, some 9.5 million of a total United States Hispanic population of 15.9 million were of Mexican descent. Moreover, the Hispanic population was the fastest growing minority group in the United States; some demographers saw their numbers doubling by the year 2000.

Less apparent but equally important was the rapidly growing trade relationship between the two nations. In 1983 Mexico was no less than the third largest trading partner of the United States and its most important supplier of oil. A further source of Mexico's importance was geopolitical in nature. Given its half-century of political stability, which was in marked contrast to the political and military upheaval taking place on the isthmus of Central America during the early 1980s, Mexico acted both as a geographical buffer and as a model of non-Marxist postrevolutionary social and political consensus.

Mexican history—a history that remained firmly embedded in the national consciousness—has been replete with more than its share of political and military upheaval. The most traumatic, undoubtedly, was the Spanish conquest of the Aztec Empire in the years following the arrival of Hernán Cortés in 1519. One of the great epic adventures of all time, the Spanish conquest represented a triumph of European military technology that, together with large doses of cunning and pure luck, allowed the conquistadores to subjugate the most advanced and powerful peoples of the New World. Millions of native Americans were killed as a result of the wars and diseases imported from Europe for which the local population lacked any immunity. The conquistadores brought a new language, a new religion, and new economic and political systems to Mexico. After 300 years of Spanish colonial rule, Mexico still had not regained its preconquest population size (see The Conquest, ch. 1).

By comparison, the Wars of Independence from Spain in the early nineteenth century, which were almost purely political and had little socioeconomic impact, were an affair of minor importance. They resulted in the creation of a new Mexican nation but failed to produce a consensus with respect to national identity. The remainder of the century saw a wide variety of rulers—from personalistic military caudillos to European royalty and from liberal, reform-minded civilians to "progressive" dictators—with their own particular visions of the Mexican nation. As a result, much of the century was marked by chaos and warfare. Foreign occupations were not uncommon; at a moment of particular weakness in mid-century, Mexico lost half its territory to the United States, which, in its own youthful vigor, arrogantly viewed its western expansion into Mexican territory as a fulfillment of its "manifest destiny."

It was the Mexican Revolution—the first successful social revolution of the twentieth century—that finally implanted a sense of nationality in the Mexican people. The Revolution was initiated in 1910 as a movement against the 34-year-old dictatorship of Porfirio Díaz. But it is not the early rebels who succeeded in ousting Díaz that modern Mexican history books recall as the most significant Revolutionary leaders. Rather, it is those leaders who defined and fought for social reform, such as Emiliano Zapata, who gave the primary impetus to land reform issues in the early stages of the Revolution, and Lázaro Cárdenas, who implemented reforms that benefited peasants and workers and nationalized United States-owned companies during the late 1930s, who are remembered as the foremost heroes of the Revolution. And it is the ideals that they evoked, such as social justice and nationalism, which came to define the essence of the Revolution and provide an identity for the modern Mexican nation. Since the end of the Cárdenas *sexenio* (six-year term of office) in 1940, the extent to which successive presidential administrations lived up to and fulfilled these Revolutionary ideals has been a major axis around which the political system has revolved (see The Revolution and the President, ch. 4).

The post-Cárdenas era was one of consolidation and institutionalization of the achievements of the previous 30 years. This was symbolized in 1946, when the government political party name was changed to what it remained in the 1980s—the Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI). Although official government parlance still held in the mid-1980s that the Revolution was an ongoing process, most outside analysts placed the emphasis on "Institutional" rather than "Revolutionary" in the party name, as well as in their descriptions of policies the party pursued after becoming the PRI. The mystique surrounding the Mexican Revolution, these analysts argued, was retained in order to legitimize authoritarian, single-party rule.

Although the PRI governed during a period of domestic peace unprecedented in Mexican history and of sustained economic growth matched by few nations of the world, its rule generated little enthusiasm in the Mexican populace. In fact, cynicism—arising from voting in elections in which the victory of the PRI candidate was almost guaranteed and a belief that the political system's inertia would prevent genuine internal reform—was pervasive among the electorate. Cynicism was confirmed by the popular perception of widespread corruption among government officials. Highly publicized scandals, such as those that surrounded several key officials of the government of José López Portillo y Pacheco, added to such common occurrences of Mexican life as bribing either a police official to avoid arrest for a petty traffic violation or a government inspector in order to keep one's business open, led many Mexicans to conclude that the entire governmental system was riddled with corruption and that all politicians publicly claimed to serve the citizenry while secretly pursuing their own personal gains.

The problem of public cynicism and the resultant apathy surrounding the political system has long been recognized by the Mexican leadership. A constitutional amendment in the early 1960s was designed to increase the congressional representation of opposition parties; a more far-reaching reform in 1977 set aside 100 seats in the Chamber of Deputies for opposition candidates. Other measures were taken to lower the voting age to 18 and to crack down on voting fraud. Both the participation of opposition party politicians and the voter participation rates increased markedly as a result, and in 1984 there was widespread speculation of opposition victories—for the first time ever in gubernatorial elections—in 1985. Of seven governorships to be contested, the Party of National Action (Partido de Acción Nacional—PAN) was expected to win in Sonora and poll very strongly in Nuevo León and San Luis Potosí as well (see fig. 1). What was not known was whether the PRI would revert to old practices of voting fraud in order to protect its long-standing hegemony over the political system (see The Rules of Political Competition, ch. 4).

Highly publicized anticorruption campaigns were also periodically undertaken, with various degrees of vigor, at the highest levels of government. President Miguel de la Madrid Hurtado's "moral renovation campaign," announced at his inauguration on December 1, 1982, appeared to be the most serious attack on bribery and malfeasance by government officials in several decades. The success of this campaign, especially the arrests of several former high-level officials, made a major contribution to de la Madrid's retention of above-average popularity during his first two years in office.

Like López Portillo before him, de la Madrid entered office in the midst of an economic crisis created, in large part, by the policies of his predecessor. De la Madrid confronted a foreign debt of over US$80 billion that, coupled with growing trade imbalances and government budget deficits, had led to an inflation rate that reached 99 percent in 1982 and to repeated devaluations of the Mexican peso (for value of the peso—see Glossary), which fell from about 26 per United States dollar to about 100 during that year. Although López Portillo had been lucky enough to rule during a period of discovery and exploitation of vast new Mexican petroleum resources and rapidly increasing oil prices, de la Madrid's first two years in office were ones of declining oil prices linked to a glut in the world market (see Growth and Structure of the Economy, ch. 3).

The de la Madrid government realized that severe austerity measures were inevitable. Shortly after assuming office, it signed a stabilization package with the International Monetary Fund (see Glossary) that had been negotiated by the preceding government. In return for almost US$9 billion in loans, the government agreed to reduce drastically the public sector deficit, restrain wage increases, reduce inflation, raise domestic interest rates, and build up its depleted foreign exchange reserves. By the time of his second annual state of the nation address, on September 1, 1984, de la Madrid could point to evidence of having achieved these goals: the public sector deficit had dropped from 18 percent to about 7 percent of the gross domestic product (GDP—see Glossary), inflation was down to an annual rate of around 60 percent, and foreign reserves had risen to above US$7 billion.

This success carried a social cost, however, of lowered standards of living for the vast majority of the population. Given Mexico's 2.5-percent annual population growth rate, the declines in real GDP of 0.2 percent in 1982 and 5.3 percent in 1983 (revised downward in November 1984 from the negative 4.7 figure announced previously) and a projected growth of a mere 1 percent in 1984 added up to a decline of well over 10 percent in real per capita GDP over the three years. Many analysts had anticipated a major social upheaval during this period, which government officials termed "the worst recession in 50 years," and the fact that it did not occur was a tribute to the maturity and resilience of the Mexican political system.

The future remained uncertain, however, for although growth rates were again on the rise in 1984, it had also become apparent that petroleum was not the panacea for Mexico's socioeconomic problems that many had hoped during the late 1970s. An apparently permanent underclass of unemployed and underemployed, which official government statistics placed at 53 percent of the population, was destined to grow even larger—owing simply to demographic factors—by the end of the century. Noting that fewer than 400,000 jobs were created annually during the boom years of 8-percent growth in the late 1970s, officials feared the consequences of estimates that 800,000 Mexican youths would be entering the labor force annually between 1985 and the year 2000. Although Mexico's population growth rate had dropped dramatically since the mid-1970s, the effects of this favorable demographic trend would not be felt in the labor market until well into the next century (see Labor Force, ch. 3).

Unemployment was most severe in rural areas, where land had become increasingly scarce since the last major push for agrarian reform in the 1930s. Migration was the only alternative to a life of wretched poverty for many in the countryside; the two strongest poles of attraction for these migrants were Mexico City and the United States. By 1984 Mexico City was estimated to have nearly 17 million inhabitants, making it the largest metropolitan area in the Western Hemisphere. The enormous strains on services and on the environment caused by such overcrowding—brought dramatically to the world's attention by disasters like the explosions in a natural gas plant that killed hundreds in a poor Mexico City neighborhood in November 1984—were additional concerns of Mexican officials for which there was no apparent solution. A government publicity campaign begun in the early 1980s to encourage new residents to return to the countryside had little initial effect on curbing the growth of Mexico City (see Mexico City's Metropolitan Area, ch. 2).

The United States has traditionally acted as a "safety valve" to relieve such pressures by its receipt of several million Mexicans each year who migrate northward in search of work. For a variety of reasons, including economic recession and a heightened sense of nationalism in the United States, this role was becoming increasingly unpalatable to the United States public during the early 1980s. Immigration reform, which largely addressed the question of how to control migration across this border (the longest in the world between an industrialized nation and one of the so-called Third World), was therefore high on the United States political agenda. Not surprisingly, it was a subject of considerable sensitivity in a bilateral relationship that had become more complex and important to both (see Relations with the United States, ch. 4).

Trade was an especially important component of United States-Mexican relations, and the rapid growth in the value of trade between them during the late 1970s and early 1980s was accompanied by what were perhaps inevitable strains, particularly over Mexican subsidies for its export products, in an otherwise mutually beneficial relationship. Despite Mexico's desire to diversify its trade away from an overreliance on the United States market, in 1983 the United States accounted for 63 percent of the value of Mexico's imports and 58 percent of its exports. Petroleum accounted for about two-thirds of all Mexican exports in that year; the importance of the United States as a customer had increased significantly in 1981, when it began purchasing Mexican oil for its Strategic Petroleum Reserve. In the increasingly important arena of finance, interest rate fluctuation in the United States and Mexico's continuing ability to renegotiate its enormous foreign debt (most of which was held by United States-based private banks) had also become crucial factors in Mexico's balance of payments considerations (see External Debt, ch. 3).

Another major area of mutual concern involved political and military developments in Central America. The United States and Mexico shared a desire to see stability return to the region following the 1979 revolution in Nicaragua but differed in their analyses of the causes of the revolutionary process in Central America and in their prescriptions for bringing about renewed stability. On the one hand, the United States viewed Cuban- and Nicaraguan-inspired subversion as the key component of ongoing regional instability and halting that subversion as the most important means to reach a peaceful solution. Mexico, on the other hand, remembering its own Revolutionary experience, viewed the revolutionary forces in Central America as an outgrowth of poverty and political repression. It viewed United States military presence in Central America with considerable skepticism and sought instead a negotiated solution that would accommodate the revolutionaries. The Mexican and United States positions seemed to converge somewhat under President de la Madrid, however, as Mexico became increasingly concerned with the security of its border with Guatemala. The new Mexican regime was less supportive of the Sandinista regime in Nicaragua than its predecessor and showed signs of greater support for the government that was elected in El Salvador in 1984 (see Latin American Relations, ch. 4; National Security Concerns for Mexico, ch. 5).

On occasion during the early 1980s, United States officials discussed its policies in Central America in terms of preserving the stability of Mexico itself. Throughout most of the twentieth century, peace across its long southern border has been a matter that the United States has been able to take for granted. A few analysts viewed Mexico's future in the early 1980s, however, with considerable trepidation. One of these was R. Bruce McColm of the New York-based human rights monitoring organization Freedom House. After analyzing Mexico's accommodation with Latin American leftists, the corruption and electoral vulnerability of the ruling PRI, and Mexico's economic and financial straits in 1984, he concluded that "Mexico is confronting what may well prove to be the most difficult decade in her history since the Revolution itself."

The great majority of observers, however, foresaw continuity with Mexico's recent stable history. They could point to the successful adjustment period of the early 1980s as a confirmation of the intrinsic stability of the Mexican political system. Once again, despite a severe economic crisis, Mexico had demonstrated its ability to incorporate a large majority of the middle class into a political consensus while using a minimum of overt repression. But the sudden explosion of revolutionary activity in Central America in the late 1970s illustrated how quickly political stability, long taken for granted, can be undermined when problems are ignored. Mexico's future was inextricably entwined with the finding of a resolution to the crisis still raging in the isthmus to the south as well as with the discovery of cures for its own social and economic ills.

December 5, 1984

* * *

The pervasiveness of corruption among Mexican officials remained in the public eye during the months following the completion of the manuscript for *Mexico: A Country Study*. The February 7, 1985 kidnapping, and subsequent murder, of United States Drug enforcement Agency official Enrique Camarena Salazar in Guadalajara brought a severe, if short-lived strain in Mexico's relations with the United States at the same time that it exposed ongoing, widespread corruption among members of Mexican law enforcement agencies. When it became apparent that the lack of progress in the murder investigation was owing to collusion between Mexican police officials and drug traffickers, United States officials publicly criticized Mexico's "lack of vigor" in the pursuit of drug traffickers. In pressing the Mexican government to intensify its investigation, the United States began carrying out stringent checks at its border with Mexico. This brought traffic and commerce to a virtual standstill for several days during March and provoked a protest from the Mexican government. The United States secretary of state, George Shultz, responding to the Mexicans' foot-dragging, stated that "our level of tolerance has been exceeded by these events." Days later, several active and former members of the Jalisco state judicial police were arrested in conjunction with the case.

When normal bilateral relations resumed in April, the Mexican government announced far-reaching reforms—including increased federal control over state police organizations and widespread dismissals that included the entire judicial police force in the state of Morelos—that were designed to crack down on police corruption. In another highly publicized case involving police corruption, Arturo Durazo Moreno was finally ordered on August 16 to be extradited from California to face a variety of charges stemming from corrupt activities while he was director of the General Directorate of Police and Traffic in Mexico City (see Police and Law Enforcement Organizations, ch. 5).

Corruption by electoral officials was headlined after the July 7 elections for the Chamber of Deputies and numerous governors and other state and local officials. Despite government assurances that the elections would be conducted honestly, fraud was reported to have been widespread as the ruling PRI won 292 of the 300 Chamber seats being contested. Defying public expectations of up to three PAN victories in gubernatorial contests, the PRI candidates were declared the victors in all seven of those races.

The PRI victory in the governor's race in Nuevo León was the most widely disputed, and on August 3, some 40 people were injured in a protest demonstration in Monterrey called by the PAN.

The big loser in these widely reported cases of official corruption was the public image of the Mexican government, both at home and abroad, which President de la Madrid had been attempting to polish through his "moral renovation campaign." The government's image became all the more important as it undertook additional austerity measures in early 1985 that increased previous cuts in federal spending and subsidies and devalued the free market rate of the peso to 350 per United States dollar, thus demanding further sacrifices by a population already weary from two years of stringent austerity. The ongoing fall in the world market price for oil compounded Mexico's fiscal and balance of payments problems, and in July Mexico reduced its prices to below those set by the Organization of Petroleum Exporting Countries (OPEC) in order to recover lost markets.

James D. Rudolph August 19, 1985

Chapter 1. Historical Setting

The conquest of Tenochtitlán, adapted from two paintings by Diego Rivera

ONE DOES NOT have to cross the Mexican border to realize the common heritage shared by citizens of Mexico and the United States. The whole of the southwestern United States brings to memory the Spanish presence during the colonial period. California, Texas, Arizona, Colorado, and New Mexico have historical roots in the conquest of land and of peoples whose previous isolation from European civilization had not prevented them from creating highly developed civilizations in the New World.

The cultural heritage of the Aztecs and Maya, seen in the ruins of their temples and pyramids, bears witness to the scientific achievements of the early inhabitants of this part of the world. New civilizations were built on the ruins of the old, but they remained intrinsically related. Mexicans are a living example of this combination: mestizos are both Indian and European, but in reality they are Mexican. The history of Mexico is the tale of the struggle between old and new and the contradictions between rich and poor, rural and urban, believer and nonbeliever. Throughout, Mexicans have longed for a more balanced life in a more egalitarian society.

It is in these sentiments that one finds the roots of the Mexican Revolution, an ongoing process that dates back to 1910, when Mexicans chose to be masters of their own destiny, even if it meant the sacrificing of their lives. The Revolution has gone through phases of violence and drastic change, especially between 1910 and 1917, but also through times of peace and gradual implementation of Revolutionary ideals, such as the 1934–84 period. The Constitution of 1917 gave Mexicans the basic framework on which to base national development: independence from outsiders and equality among all citizens.

Tourism was the usual avenue that brought Mexicans and North Americans in contact, but tourists were usually struck only by the superficial aspects of any society, and thus stereotypes developed. To appreciate Mexican society and its diversity, it is necessary to go beyond the pyramids, just as foreigners cannot perceive the United States by visiting the Empire State Building. But ignorance about Mexico is also derived from a complexity that fascinates the student of Mexican history and society.

Mexico has achieved a degree of national identity that was shaped by the intellectuals of the 1920s. Political continuity produced peaceful presidential transitions after the 1930s because of the restriction of no reelection of an incumbent president; politics became the realm of politicians (instead of generals); economic growth and industrialization were carried out, mainly since World War II; and communications were improved, as were literacy and health. Mexico remained a land of contrasts, however, and it was often argued that political participation was restricted by the predominance of the government party; that poverty and external debt were a corollary to economic growth; that regionalism remained stronger than national identity; that corruption pervaded the bureaucracy; and that, although population had exploded, domestic food production was not sufficiently developed. The arguments on both sides could be carried on forever.

Pre-Conquest Mexico

Mexican society is permeated by the past, which is translated in the enduring presence of the early indigenous population in all forms of cultural expression—philosophy, art, and literature—as well as in the physical features of the mestizo. Following the Spanish conquest, however, there was an attempt to erase all things related to the Mexican past, the result of overzealous conquerors and missionaries who saw fit to "civilize and evangelize" the native peoples of the New World. Thus, the Europeanization and Christianization of Mexico led to the dismissal of all things Mexican for 400 years.

This situation was finally reversed in the 1920s, during what has become known as the cultural phase of the Revolution, when a conscious effort was undertaken to search for a national cultural identity known as Mexicanidad ("Mexicanness"). As a result, since the 1920s scholars have researched Mexican native values and the cultural expressions of those values in contemporary society. Their origins have been traced to the advanced civilizations encountered in 1519 by Hernán Cortés (whose first name also appears in historical literature as Hernando or Fernando).

Ancient Mexico

The first Mexicans were descendants of Asian nomads who took part in a series of migrations across the Bering Strait as early as 50,000 B.C., during the initial phase of the Wisconsin Ice Age (Pleistocene). At that time ocean levels had fallen, uncovering a land bridge that facilitated migratory movements from Asia to Alaska. It is possible to date the arrival of the first Mexicans at some time around 40,000 B.C., even though little is known about them. By the end of the Pleistocene epoch, around 8000 B.C., the melting of the ice cap resulted in the rise of ocean levels, which discouraged further population transfers.

Archaeological evidence testifies to the presence of early hunters and gatherers in Mexico around 10,000 to 8000 B.C., when wild vegetation and large game were plentiful. By 7000 B.C. life had to be reorganized and adjusted to new climatic conditions, when a much drier environment led to sparse vegetation and to the extinction of large animals, thus allowing rudimentary agriculture to take hold. During the next few thousand years, man achieved the domestication of plants, such as corn (indigenous to Mexico), squash, and beans. Under favorable conditions of food supply, man became a more permanent settler. Around 2000 B.C. another period of moist conditions further improved food resources beyond the threshold of mere survival. Leisure time became available and was used for refining technical skills.

The next phase in the development of ancient Mexico, known as the Formative period, was characterized by the effective cultivation of previously domesticated plants and the settlement of populations in villages and hamlets throughout Mexico. Villages appeared as a result of more people and greater food supplies. The dates for the early stages of this period were determined by radiocarbon dating of a profusion of pottery, a previously nonexistent craft that appeared around 1500 B.C. in the findings at Chiapa de Corzo in the form of handmade clay figurines and clayware quite sophisticated in their shape and decoration (see fig. 2).

The end of the Formative period coincided with the emergence of temple-pyramids, a tremendous technological advance. The pyramids became the nuclei of large villages and towns. Sites like Cuicuilco (on the outskirts of present-day Mexico City) survived through the Christian Era (A.D. 100), and the Olmec centers of Monte Albán and La Venta were thriving between 800 and 300 B.C. The greatest and most influential site in ancient Mexico, Teotihuacán, had its beginnings in the late Formative period, when a polytheistic religion evolved at that civic-religious center of authority to all Mexican peoples.

Between 200 B.C. and A.D. 900, Mesoamerica was the scene of high civilizations. This Classic period has been designated as the Golden Age of Mexico, a time when the arts and sciences reached their apex, when a high degree of literacy was attained, and when the elaboration of a mathematical system permitted the accurate recording of time. Religion was polytheistic, revering the forces of nature in the gods of rain, water, the sun,

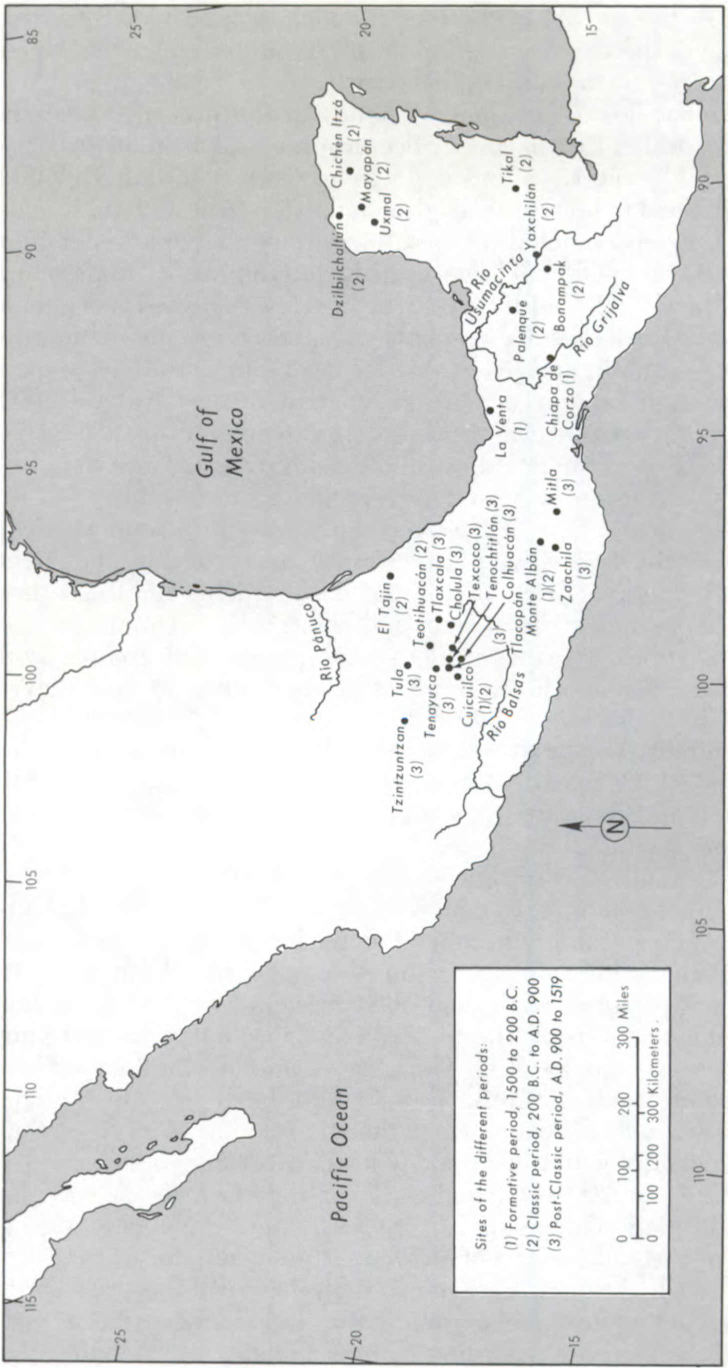

Gulf of Mexico
Pacific Ocean
Río Pánuco
Río Balsas
Río Usumacinta
Río Grijalva
Dzilbilchaltún (2)
Chichén Itzá (2)
Mayapán (2)
Uxmal (2)
Tikal (2)
Yaxchilán (2)
Bonampak (2)
Palenque (2)
Chiapa de Corzo (1)
La Venta (1)
Mitla (3)
Zaachila (3)
Monte Albán (1)(2)
El Tajín (2)
Teotihuacán (2)
Tlaxcala (3)
Cholula (3)
Texcoco (3)
Tenochtitlán (3)
Colhuacán (3)
Tlacopán (3)
Cuicuilco (1)(2)
Tenayuca (3)
Tula (3)
Tzintzuntzan (3)
N
Sites of the different periods:
(1) Formative period, 1500 to 200 B.C.
(2) Classic period, 200 B.C. to A.D. 900
(3) Post-Classic period, A.D. 900 to 1519
0 100 200 300 Miles
0 100 200 300 Kilometers
85
90
95
100
105
110
115
25
20
15

Figure 2. Pre-Conquest Mexico

and the moon. The most important deity was Quetzalcoatl, the feathered serpent—the essence of life— from which all knowledge derived. Metals came into use only by the end of the period, but despite this handicap, impressive architectural structures in Teotihuacán, the Pyramid of the Niches at El Tajín in the state of Veracruz, and the Temple of the Sun at Palenque were built and survive to this day.

These highly developed civilizations produced pottery, statuary, and ornate buildings, despite their being supported by a simple agricultural economy based on the cultivation of old traditional staples. Social stratification was clearly defined by the existence of a ruling class of priests and intellectuals overseeing a large peasantry. The Classic period was marked by "a general sense of order and serenity, reminiscent of the Athenian ideal of moderation in all things," as professors Michael Meyer and William Sherman describe in their authoritative work, *The Course of Mexican History*.

The three most important Classic sites were Teotihuacán (in central Mexico), Monte Albán (to the south, in the state of Oaxaca), and the Maya complexes (in the states of Chiapas, Tabasco, Campeche, Yucatán, and Quintana Roo, as well as in the nearby countries of Honduras, Guatemala, and Belize). The first truly urban center in the Western Hemisphere—Teotihuacán—came into being around 200 B.C. and, strengthened by its population of 100,000 inhabitants, became the dominant power from northern Mexico into Guatemala. The city was built around a ceremonial center along the Avenue of the Dead, and its landmarks were the huge Pyramid of the Moon, the Pyramid of the Sun, and the Temple of Quetzalcoatl. Such large structures testify to the availability of manpower, which could be called upon for civic-religious undertakings. Teotihuacán was a busy market; the fact that its wares could be found all over ancient Mexico testifies to its influence and power. The city was destroyed by fire around A.D. 800, as evidenced by thick layers of ashes that covered the site.

Even older than Teotihuacán, Monte Albán developed as a typical elite center around 600 B.C. Located above the Valley of Oaxaca, its construction also required an enormous labor force because all materials, water included, had to be hauled uphill. The influence of the priestly ruling class was such as to qualify Monte Albán as a theocracy. Their deities, nevertheless, were shared by other Mexican peoples and included the Rain God, the Maize God, Quetzalcoatl, the Bat God, and the Old Fire God, whose representations are found adorning pottery and carvings.

In terms of scientific achievements, Monte Albán developed a system of writing and a calendar even before similar advancements took place in Teotihuacán. By A.D. 650, Monte Albán's hegemony had extended to areas previously dominated by Teotihuacán. In spite of its glory, the settlements in the valley deteriorated, and Monte Albán was abandoned around A.D. 900. However, other Mexican peoples continued to return to the valley to bury their dead in the old consecrated ground.

The Classic Mayan sites in Mexico developed between A.D. 300 and 900. Most sites were religious centers—the residences of priests and their acolytes. Until the arrival of the Spaniards, Tikal—one of the earliest Mayan sites (probably founded before A.D. 320), located in the jungle of El Petén in present-day Guatemala—had a population comparable to that of Teotihuacán. Tikal's architecture comprised not only six pyramids, plus plazas and temples, but also reservoirs and artificial lakes. Mayan art displayed more human forms in carvings and decorations than that of central Mexico, and the scientific achievements of the Maya were based more on refining existing knowledge than on generating new. Among these were two calendars, chronological markings on stelae, and hieroglyphics. Nevertheless, by A.D. 900 the ceremonial centers were abandoned to the jungle for reasons that remain a mystery.

The fall of Teotihuacán led to the fragmentation of power that marked the end of the Classic period. The causes of its destruction can only be speculated on as being bad harvests, drought, pressures of a larger population upon the land, and/or pressures from the outside. In any event, whatever the factors may have been, they provided the groundwork for the next phase, the Post-Classic period, which would be a radical change from the Classic.

The main characteristic of the period was a sudden surge of militarism and, as historian Michael Coe expresses it in his book, *Mexico*, "a glorification of war in all its aspects." From A.D. 900 to the dawn of the conquest in 1519, the Valley of Mexico was more Spartan than Athenian in its ideals. The old hierarchy of priests and intellectuals was replaced by a class of professional warriors organized into military orders named after animals whose ancestry they claimed, such as the jaguar, the coyote, and the eagle. Religion was degraded by the presence of fierce gods requiring human sacrifices. It seemed that in the midst of all this were great turmoil and numerous migrations; people moved everywhere and anywhere they could find allies to fight their common enemies. Wars ceased to be waged for territorial expansion and became a means for exacting tribute and for capturing prisoners to be sacrificed to the gods. For the first time, architecture centered on defense and fortification. It was a whole new ethos; a different society was in the making.

By the end of the Classic period, scientific achievements had reached a plateau. As a result of long-distance trade, metallurgy was introduced into Mexico from the Andean region in the early Post-Classic period. Metalwork did not change traditional wood implements to any significant extent but was used to create luxury items, such as jewelry and ornaments (in gold, silver, and copper), an art that Mexicans mastered as superb craftsmen.

The cohesion of pre-Conquest Mexico was established by three nuclei: Teotihuacán, during the Classic period; Tula, the largest militaristic site of the Post-Classic period; and Tenochtitlán, the Aztec center on the eve of the Conquest. Tula was founded around A.D. 968 and was built by the Toltecs. Despite its short life of about 200 years, its legends became part of later tradition and the pride of the Aztecs, permeating "the consciousness of the land for 500 years," according to Meyer and Sherman. Most of the panegyric revolved around the ruler Topiltzín-Quetzalcoatl, from whom all good emanated. (Topiltzín-Quetzalcoatl arrived at Tula in the tenth century. He was a young man of about 27 who became the ruler of the Toltecs three years later.) However, there were factions within his idealized realm that dissented, and they plotted Topiltzín-Quetzalcoatl's fall on moral grounds. As the story goes, the king was tricked into drinking pulque (liquor made from agave cactus juice) and committed incest, which led to his voluntary exile in 1005, after 22 years in power. The description of his journey to the East and his physical appearance (white and bearded) later worked to the benefit of the Spaniards, for the legend predicted his return from the Eastern horizon.

The fall of Topiltzín-Quetzalcoatl prompted the rise of a more warrior-like faction that led the Toltecs into an expansionist phase represented by a new emphasis on the warrior side of society and an increased emphasis on human sacrifice. By 1156 the mighty Toltecs were hit by drought and famine while wars were being waged everywhere. Tula was finally abandoned, and more confusion and migrations took place. Fringe populations competed for the control of the Valley of Mexico, (known as the Valley of Anáhuac in pre-Hispanic times), giving rise to a renewed process toward political integration.

After the fall of Monte Albán, Zapotecan influence remained in the Oaxaca region and was coordinated from their capital of Zaachila. The town of Mitla, however, is the best example of

Zapotec artistry and was a religious-military center exquisitely done in sculpted stone that showed remarkable craftsmanship. Despite its beauty, Mitla was a fortress and a witness to the warfare in the area.

The Mixtecs (or Cloud People) were another important group during the post-Classic period who were influenced by the Toltecs while simultaneously bearing upon the Zapotecs through intermarriage and warfare. Mixtec artisans were also superb historians, producing codices that were beautifully illustrated as early as A.D. 692. After coming into contact with the techniques of metalwork, the Mixtec jewelers produced work that came to be recognized as the most refined and elaborate in all Mexico.

At about the time Classic Mayan sites were losing their preeminence, Mayan Yucatec culture started to emerge as a result of contacts with Classic peoples who began wandering into the area in about A.D. 900. By the tenth century, an important influx of Toltec culture was brought into Yucatán by the people who accompanied Topiltzín-Quetzalcoatl in his flight from Tula. For security reasons, Toltec Chichén Itzá established an alliance with two other Yucatecan centers, Mayapán and Uxmal, that lasted more than 200 years. Toltec influence was everywhere, from art to religion, in the form of a glorification of warfare and the increase of human sacrifice. Internal dissension provoked the end of Chichén Itzá's hegemony and the rise of Mayapán, which would last for another 250 years of steady cultural decline and increased militarization.

The Aztecs

Before the Conquest, the Valley of Mexico drew people from Mesoamerica who were attracted by its abundant sources of water, easy communication, and plentiful game and vegetation. The valley was like a corridor through which all migratory movements passed and sometimes settled. During the pre-Columbian era, the valley was in constant turmoil unless central authority and political hegemony existed, as it did under the aegis of both Teotihuacán and Tula.

After the collapse of Tula in the twelfth century, refugees from the city settled south of the valley and founded Colhuacán and Xico, which became centers for the dispersion of Toltec culture to the northern barbarians. The early Chichimecs (desert tribes) settled around the already established centers and adopted the sedentary mores of their civilized neighbors. The Chichimecs founded Tenayuca in 1244 and then proceeded to conquer the important center of Colhuacán in 1246. Atzcapotzalco, an ancient settlement founded by exiles from Teotihuacán, was infiltrated by the nomadic Tepanecs in 1230. During the reign of Tezozómoc (1363–1427), Atzcapotzalco dominated the valley and conquered Tenayuca, Colhuacán, and Texcoco. Most of these centers were inhabited by Náhuatl speakers, and language became a common bond among the peoples in the area.

The last nomadic Chichimecs who arrived in the valley were the Mexica, or Colhúa-Mexica, more commonly known as the Aztecs. Their origins are obscure; according to legend, they came from a mythical island off the Pacific coast called Aztatlán, or Aztlán, around 1111. They were said to have made their way to the valley guided by their sun/war god Huitzilopochtli (meaning hummingbird on the left). The inhabitants of the valley viewed the new arrivals with suspicion and tried to prevent their settlement. After much wandering and a few wars, in 1325 or 1345 the Aztecs reached some marshy islands on the shore of Lago de Texcoco (on the eastern edge of present-day Mexico City), where they saw an eagle perched on a cactus tree and holding a snake in its beak (an image reproduced on the modern Mexican flag). According to old Aztec legend, this was a sign indicating where they should build their city. Tenochtitlán was eventually built on an island in Lago de Texcoco and gradually became an important center in the area. Water came from Chapultepec on the mainland, and causeways connected the island to the shores of the lake. The Aztecs were forced into an alliance with the Tepanecs and served them as mercenaries but, under their protection, were able to establish a monarchy in 1376, having Acamapochtli as their first king.

The consolidation of Aztec power came under Itzcoatl, the ruler who made Tlacaélel his adviser in 1427. Tlacaélel was a knowledgeable man who sought to introduce internal reforms to enhance Aztec domination. He began by burning all records that failed to glorify Aztec victories; instituting the "Flowery Wars," whose sole purpose was to capture enemies for sacrificial offerings; undertaking a major reorganization of internal government, politics, and the judicial system; and establishing a Triple Alliance with the Acolhúas of Texcoco and the Tepanecs of Tlacopán. Together they started to expand the frontier into nearby areas, even though the Triple Alliance was soon to be dominated by Tenochtitlán.

Around 1450 to 1451, snow, rain, and floods led to losses of staple crops and thus to famine. Five years of near-starvation did not discourage human sacrifices. When normalcy resumed, the

Photo by James D. Rudolph

Pre-Hispanic ruins of Mexico: Chichén Itzá (above), Teotihuacán (top right), and Palenque (bottom right)

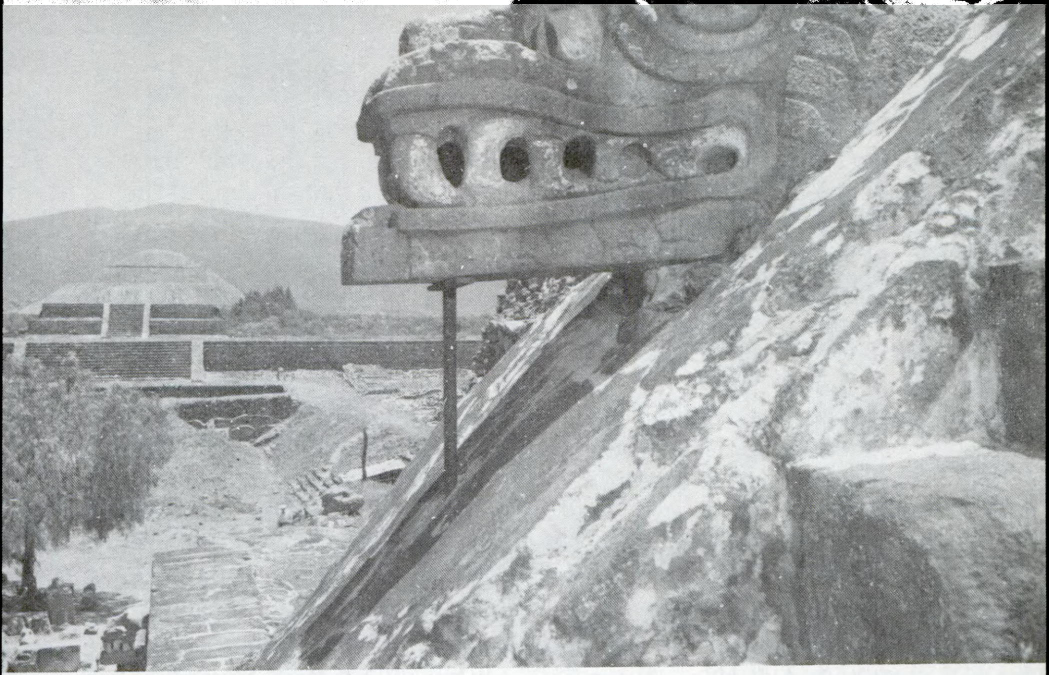
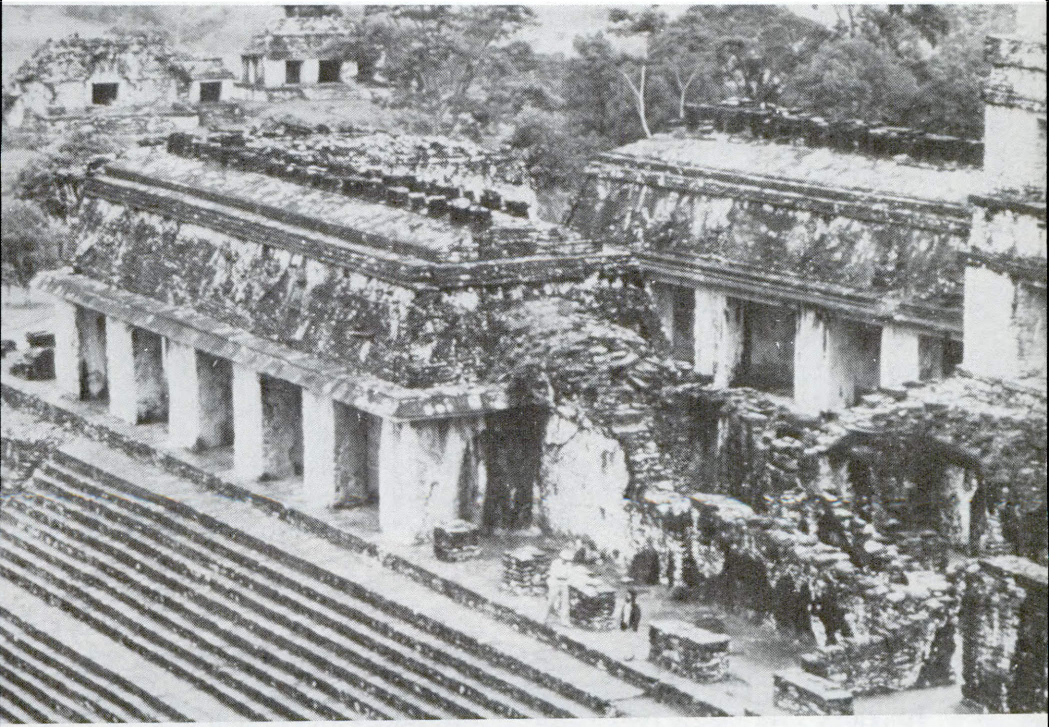


Photo by Arturo Salinas



Courtesy Mexican Government Tourist Office priests made sure the population understood that the good times were a result of the generosity of the gods and that, in return, the gods should not be left without their offerings of human sacrifices in ever greater quantities.

By the early sixteenth century, Aztec domination reached into most of central and southern Mexico (with the exception of the Mayan areas in the southeast). There was virtually no interest in advancing north into the Chichimec territory, where tribute could not be exacted from the nomadic desert tribes. A few other pockets of population remained outside Aztec rule; the most important of these were the Tarascans and Tlaxcalans. According to tradition, the Tarascans had taken part in the migration from Aztlán but had been tricked by the group that went on to found Tenochtitlán. They established their capital at Tzintzuntzan in the present-day state of Michoacán, and in 1479 they repulsed an Aztec offensive by killing 20,000 enemy soldiers with their copper weapons. The Tlaxcalans had their origins in the early Chichimec tribes that settled east of the Valley of Anáhuac. During several periods they were allied with the Aztecs, and during the great famine of the 1450s the Aztecs and Tlaxcalans staged the "Flowery Wars." The wars, which subsequently became endemic and political, were to work to the great advantage of the Spaniards in 1519.

Aztec society was characterized by a dichotomy in which beauty and refinement coexisted with the brutality of human sacrifice. The idea of immolation was linked to the Aztec cosmic view of the universe, where all living things were part of a permanent cycle in which the gods provided rain and sunlight that allowed plants to grow, which then became food for man, who, in turn, completed the cycle by offering his own life to the gods. The Aztecs further believed that a series of four cataclysms had occurred before their time, when the sun and the earth had been destroyed and restored; the fifth time this happened would bring final destruction. To please the sun/war god Huitzilopochtli and thus avoid the cataclysm, continuous offerings had to be made. According to Meyer and Sherman, "for religious reasons, militarism was elevated to virtue." Religion was part of all aspects of the lives of the Aztecs, who maintained a pantheon of deities to protect them from natural disasters and evil spirits and to assure them of an afterlife among fragrant blossoms and perfumed clouds or reincarnation as a hummingbird.

Before the settlement at Tenochtitlán, Aztec society was quite simple in its organization and was composed of peasants, warriors, and priest-rulers. Afterward, and with a much larger population, there was an increasing division of labor and a more complex social structure. The emperor was selected according to merit from among the ruling dynasty. Members of the royal family were responsible for setting examples, in terms of dignity and valor, for the commoners. The nobility was composed of the high priests, the military, and political leaders. There was no right of inheritance; nobility was a result of distinguished service, which was also an avenue of social mobility for the lower strata. The nobles enjoyed certain privileges, such as fine garments, better housing, servants, jewelry, and prestige, but always avoided public displays of wealth. All men were expected to bear arms; distinction in battle meant prestige, possible entry into special military orders, and the right to wear the orders' special attire. Another avenue of mobility was the priesthood, to which were admitted men and women at age 21 who had been trained at the *calmecacs* (religious schools) as children. Priests led exemplary lives of prayer, fasting, and penance; their power derived from their knowledge and their special skills as musicians, painters, dancers, and teachers and from presiding over ceremonial sacrifices.

Aside from the nobility, there was another important stratum in Aztec society—that of the *pochteca* (merchants), who were responsible for local and long-distance trade as far as Central America. These merchants were men of great skill, speaking the languages of the peoples they encountered in their journeys, fighting enemies on the way, and at the same time working as spies for the Aztec militarists. They lived apart in the city and had their own courts, their own guild, and their own gods. Although very articulate, they were not permitted to exercise influence or power.

The *maceguales* (commoners), the largest segment of the population, were farmers, craftsmen, servants, vendors, and lower civil servants who lived in *calpullis* (neighborhoods or barrios). Each *calpulli* was like a clan operating as an extended family. Land was held in common by the *calpulli*, and each individual had to apply for the right to use it. The clan provided labor and services (tribute) as a unit, and in times of war they fought as a group under their own leaders.

At the lower strata of society were the *mayeques* and the slaves. The *mayeques* were people who lacked traditional ties to a *calpulli*, were considered inferior to the commoners, and were very likely part of a conquered group. They were wage earners who provided their labor to the upper classes. The slaves were at the bottom of the social scale, even though slavery did not carry the stigma of later times. Slaves had rights, and bondage was not inherited from one's parents. Slavery could be a short-term arrangement with a specific purpose, sometimes as punishment for a crime or as payment for a debt, and there was no impediment to marriage between slaves and free persons.

Aztec society was deeply committed to the education of children and their training. Two kinds of schools were available: the *calmecacs,* where children from the upper classes were trained for both the priesthood and high government posts, and the *telpochallis,* where the lower classes sent their offspring for more practical training and a career in the military or in some kind of trade. Parents were very strict with their children; misbehavior was severely punished. At home, girls were taught basic skills, such as cooking and sewing, in preparation for future responsibilities as wives and mothers, while boys were trained in agriculture and crafts.

The political structure of the Aztec empire was based on a loose coalition of city-states under the fiscal control of Tenochtitlán. The main objective of Aztec expansion was to exact tribute from conquered peoples. Tributes were in kind; cacao, cotton, corn, feathers, precious metals and stones, shells, and jaguar skins were among those sent. The towns also had the obligation to provide soldiers and slaves and to recognize Aztec supremacy and the supremacy of their god Huitzilopochtli. Otherwise, towns were basically free to conduct their internal affairs, and thus Aztec hegemony was never fully consolidated—a fact that eventually became a major element in the fall of the empire.

The social organization of the empire was very moralistic. People were punished according to the degree of the offense and the social status of the offender. The upper classes were more severely punished because of their moral responsibility to set examples for the rest of society.

In the arts, the Aztecs excelled in the architecture of great stone-carved buildings. Their craftsmen were specialists in jewelry and feather mosaics. Music was used for ceremonial purposes; musicians held a special standing in society for their participation in religious celebrations, where they played their flutes, rattles, and drums. Literature was also cultivated in prose and poetry, although historical accounts were not recorded in writing but passed orally through the elders.

In spite of the sophistication of Aztec society, it fell under external pressures brought about by the arrival of the Spanish conquistadores in 1519. The autonomy of the city-states and their grievances against their overlords worked to the conquerors' advantage. The mighty city of Tenochtitlán, with its defense system of causeways, was defeated and sacked. The enlightened emperor

Moctezuma II (who reigned from 1502 to 1520) lived under the influence of the old Toltec legend that promised the return of Topiltzín-Quetzalcoatl to claim his rightful position as ruler of the peoples of Mexico (see Ancient Mexico, this ch.). In fulfillment of the old legend, the "white man with a beard and carrying a cross" arrived in the person of Hernán Cortés and provoked destruction and despair among the people who had created a great empire in the New World.

The Conquest

The fall of Granada, Spain, in 1492 marked the end of almost eight centuries of Moorish occupation of the Iberian Peninsula. It released manpower previously engaged in the wars for Spanish expansion to new frontiers, which was made possible by another event that took place in 1492—the discovery of the Americas by Christopher Columbus (whose Italian name was Cristoforo Colombo, also known as Cristóbal Colón in Spanish).

After Columbus' first voyage, a wave of scientific curiosity and/or sheer adventure enveloped the minds of Europeans, who saw the possibilities of wealth and prestige in the conquest of new domains for Spanish monarchs. The men of the Age of Discovery wanted to circumvent the Ottoman Empire to establish new trade routes to the Far East. It was in this spirit that Columbus reached the island of Hispaniola, believing he had landed somewhere in Asia (Indies), which was corroborated by the physical appearance of the natives and the natural environment encountered. Because of that initial mistake, the new lands became known as the Indies, and its inhabitants were referred to as Indians.

Cortés

Other expeditions followed in Columbus' footsteps, and on one of them sailed Hernán Cortés, the conqueror of Mexico. He was born in 1485 in the Spanish province of Extremadura. After receiving a gentleman's education, at age 19 he joined a fleet bound for the New World. Upon arrival at Hispaniola, he went to see an old acquaintance, Nicolás de Ovando, who was governor of the island. Soon enough Cortés received grants of land and Indians and was appointed notary at Açúa. In 1511 he joined Diego Velásquez on an expedition to Cuba and settled at Santiago de Barracoa with another bequest of property and laborers. After seven years as a settler, Cortés yearned for more adventures and decided to outfit an expedition to explore the coast of the Yucatan peninsula. Despite many obstacles and delays, and even against the express orders of then governor Velásquez, Cortés assembled a fleet of 11 ships, an army of 508 soldiers, 100 seamen, more than 200 Indians, 16 horses, and necessary guns and ammunition. Finally, on February 18, 1519, the fleet sailed to the Yucatan.

After an eventful voyage, Cortés and his fleet reached the island of Cozumel and made contact with a Spanish survivor of a shipwreck, who became invaluable as an interpreter, and the fleet continued on its northwestern course. At Potochán (in the present-day state of Tabasco) the Spaniards fought victoriously against Indian resistance, and thus arose the legend of the invincibility of the white conquerors. As a result, other Indian chieftains approached the party and brought them gifts. The most valuable of these turned out to be a young maiden, baptized Marina (later given the name Malinche by the Mexicans, who associated it with treason), who spoke Náhuatl and Maya. She became an interpreter and accompanied Cortés throughout the Conquest, eventually bearing him a son. All through the contacts with the natives, references were made to the people living in the Valley of Anáhuac, the mighty Aztecs, and their king, Moctezuma.

At San Juan de Ulúa the Spaniards started their march inland, but not before establishing a settlement at Villa Rica de la Vera Cruz (present-day Veracruz), where Cortés was appointed its first judge and captain. Once political authority was defined, the expedition set out to Tenochtitlán. Along the way, the party met with peoples under Aztec domination who resented them for their exaction of tribute and the capture of prisoners and who were more than happy to be of some assistance to the Spaniards. At Tlaxcala, Cortés met more resistance from a group of Aztec enemies who had grown suspicious of the Spaniards' still unstated intentions. Peace was finally achieved, and the Tlaxcalans became valuable allies of the conquistadores.

The first real threat to Cortés' expedition was staged by the people of Cholula, who fought unsuccessfully against the Spaniards. The victory against the Indians was relayed to Moctezuma, who despaired at the approach of the legendary white men. From Cholula, Cortés marched to Texcoco on the shores of the lake. There, the chieftains tried to dissuade Cortés from continuing to Tenochtitlán, but to no avail. The Spaniards marched down from Itztapalapa, and the soldiers already glimpsed the city standing at the end of the causeway. The best account of this event has been left by the soldier-historian Bernal Díaz del Castillo in *The Discovery and Conquest of Mexico, 1517–1521:*

> Gazing on such wonderful sights, we did not know what to say, or whether what appeared before us was real, for on the one side, on the land, there were great cities, and in the lake ever so many more, and the lake itself was crowded with canoes, and in the Causeway were many bridges at intervals, and in front of us stood the great City of Mexico.

At the end of the causeway, the Spanish forces crossed a drawbridge to enter the city, and there Moctezuma waited for them, dressed in full regalia. The emperor greeted Cortés as if he were Quetzalcoatl himself, the man-god who had returned to his rightful throne as ruler of the peoples of Mexico.

La Noche Triste and the Fall of Tenochtitlán

Cortés and his men were treated regally, even though the feeling of being trapped inside the walls of the city of Moctezuma was pervasive. After a while the troops became restless and, to reassure them, Cortés placed the emperor under house arrest at his own palace. Moctezuma seemed to be resigned to his fate. Meanwhile, Cortés received news of a Spanish fleet that had arrived at San Juan de Ulúa under the command of Pánfilo de Narváez, who carried express orders for Cortés' arrest. Cortés left the command of his men to Pedro de Alvarado and went to meet Narváez. Once Cortés established his authority, he acquired an army three times the size of his own and prepared to return to Tenochtitlán. At that point, menacing news of an Aztec uprising came from the city. The revolt was linked to Alvarado's mishandling of matters related to a religious festival in which human sacrifices had been prohibited by the Spaniards. Apparently Alvarado was told that sacrifices would take place and that the Spaniards would be offered to the gods. The troops delivered the first strike, but, faced with strong Aztec resistance, they had to retreat to their own quarters while surrounded by enraged Aztecs. Finally, Cortés made his way back to the city, accompanied by Narváez' reinforcements. The enemy was not intimidated, and when the Spaniards realized that they would be decimated, they retreated to Tlacopán (present-day Tacuba) on the night of July 1, 1520. The march was full of hardship for all involved, and hundreds of people died under heavy Aztec attack. According to Bernal Díaz, more than 860 Spaniards lost their lives in what became known as La Noche Triste (The Sad Night).

After the terrible defeat, Cortés sought asylum at Tlaxcala, from where he would launch the next assault on Tenochtitlán. The plan was to attack both from the land and from the lake. Meanwhile, the Aztecs celebrated their victory over the invaders and elected Cuitlahuac to the throne after Moctezuma's death. Moctezuma had died while trying to mediate between his people and Cortés' forces before the latter's retreat to Tlaxcala. The new ruler was in power for a short period and died victim of a smallpox epidemic that was introduced by the Spaniards and that took a toll on the Aztec population. Cuauhtémoc succeeded his brother as emperor; he was an 18-year-old warrior who was to lead his people through the most difficult times.

In late December 1520 the Spaniards marched back to the Valley of Anáhuac and established their camp at Texcoco. While waiting for the carpenters to finish building the launches that would be used in the war operations on the lake, Cortés set out to win the allegiance of the peoples on the mainland. By May 1521 the fighting forces of 13 launches, 15 cannons, three heavy guns, 900 Spaniards bearing arms, 100 Indian warriors, and the necessary provisions were ready, and the troops moved into their attack positions on the lake and inland before delivering the final blow on Tenochtitlán. Despite the superiority of European strategy and arms, the fight continued for several weeks. Tenochtitlán fell on August 13, 1521, and Cuauhtémoc was captured as he tried to flee the city. The victory marked the end of a great civilization whose militaristic character was maintained until its very destruction. Cuauhtémoc, the last Aztec emperor, became a legendary figure, a symbol of honor and courage who is revered to this day as the first Mexican national hero.

New Spain

After the fall of Tenochtitlán, the Spaniards' task was to settle and expand the new domains on the mainland of North America and Central America that became known as New Spain. Cortés dispatched several expeditions to survey the areas beyond the Valley of Mexico and to establish political control over the land and its inhabitants. Once removed from the central political control of Tenochtitlán, most towns surrendered to Cortés' men. As a symbol of political continuity, the capital of the new colony was to be built on top of the ruins of Tenochtitlán and was renamed México after the Colhúa-Mexica tribe (hereafter, this city will be called Mexico City).

From Mexico City, Cortés also sent emissaries to the king of Spain to secure his claims and rights to the conquered lands. However, his enemies in the mother country were building a case against his pretensions and even contested the legitimacy of his expedition. In New Spain, potential rivals sprang from the ranks, such as Cristóbal de Olid, who led a separatist expedition to Honduras. This forced Cortés to leave Mexico City under the command of trusted officials while he marched to Honduras to settle the dispute. While Cortés was away, his opponents declared him dead and proceeded to seize power and demote his appointees from their posts. When the conquistador returned, he punished the usurpers, and in 1522 he was appointed governor and captain general of New Spain, proving himself an outstanding administrator. Meanwhile, in Spain, Cortés was the object of a series of accusations by his enemies. In 1528 he decided to plead his case personally to the king and arrived at the Spanish court, along with an entourage of Indian nobles, bringing samples of native animals and plants. As a result, Cortés was confirmed as captain general of New Spain and was awarded 22 *encomiendas* (meaning, literally, "in trust") of Indian towns and 23,000 Indian vassals. He was also given the title of Marqués del Valle de Oaxaca. It was not until 1535 that viceregal authority was established in New Spain. Initially, the viceroyalty of New Spain comprised only central and northern Mexico, from Zacatecas in the north to the Isthmus of Tehuantepec in the south.

Encomiendas

The conquest of the Aztec empire represented an enormous effort and a tremendous sacrifice endured by Cortés' army, and the soldiers demanded what they had come for: prestige and wealth. The spoils from the city had been lost for the most part during the flight from Tenochtitlán on La Noche Triste, and even Cuauhtémoc had been tortured, to no avail, in an effort to force him to disclose the location of hidden treasures. Cortés had to resort to some other strategy to provide for his men. At that point the conquistador had already surveyed all Aztec records related to tributes and tributary towns and, on the basis of this information he had decided to distribute grants of Indians and land among his men. This practice had already been tried in the Caribbean, and Cortés himself had already received *encomiendas* in Hispaniola in 1509 and in Cuba in 1511. From then on, it became an institution throughout New Spain to ensure subordination of the conquered populations and the use of their labor by the Spanish masters, as well as a means to reward Spanish subjects for services rendered to the crown.

The *encomienda* had its origins in Spanish feudal institutions of Roman origin, and in the New World it established a series of rights and obligations between the *encomendero* (grantee) and the Indians under his care. The Indians were required to provide tribute and free labor to the *encomendero* , who was responsible for their welfare, their assimilation into Spanish culture, and their Christianization. Stratification among the *encomenderos* was easily achieved by the simple fact that there were Indian communities of different sizes. The larger the grant, the larger the amount of tribute and labor available and thus the greater the potential wealth and prestige of the assignment. In reality, the Indian population was accustomed to a similar organization of tributary towns under the Aztecs. In time, the *encomenderos* became the New World version of the Spanish feudal lords. This came to worry the crown because of the dangers of allowing the creation of a local nobility capable of contending peninsular authority.

Several measures were attempted to curtail the power of *encomenderos*. The most effective were associated with Bartolomé de las Casas (1474–1566), a Spanish priest who became known as the "Protector of the Indians" in the New World. He challenged the racist overtones of the Spanish Conquest and defended the ideas of St. Thomas Aquinas on the dignity of man. As such, he pressured the crown to enact legislation for the protection of the Indians, the abolition of the *encomienda* system, the return of Indian lands seized by the Spaniards, and the restriction of Spanish involvement in the New World to evangelization. The ideas of las Casas resulted in the promulgation of the New Laws of 1542 and 1543. These laws emphasized humanitarian ideals toward the Indians, regulated tributes, abolished inheritance rights for the grants, and prohibited religious and royal officials from holding the grants. The system was dependent on the existence of large Indian populations that, by the mid-sixteenth century, had been greatly depleted as a result of contact with Europeans and their diseases, to which native peoples had no immunity. Consequently, by the end of the sixteenth century the tributary aspects of the *encomienda* system were in decline and unable to provide sufficient income for the upper classes in New Spain.

Although the Indian labor pool was declining, more Spaniards kept arriving with great expectations. Along with this flow of Europeans came the African slaves who were directed to the central areas of New Spain. In 1549 Indian labor obligations, as well as payment of tribute in the form of labor, were terminated. To compensate for all the losses, the crown resorted to a new system of forced labor allotments *(repartimientos)* of 45 days a year, for which every Indian was to be paid in wages. The *repartimiento* became a source of abuse by employers who would lure the Indians with advances of their wages, which tied them for life to an informal system of slavery best known as debt peonage.

In the late seventeenth and early eighteenth centuries, royal control of the granting of *encomiendas* became more strict. On November 13, 1717, a royal decree withdrew the rights to grant *encomiendas* , an act that was confirmed by other decrees in 1720 and 1721. However, in the most remote areas, *encomiendas* were often kept throughout the colonial period in complete defiance of the crown. The eighteenth-century colonial aristocracy would not rely upon *encomiendas* , however, but would be made up of a landed elite and of miners and merchants (see Socioeconomic Structures, this ch.).

Colonial Administration

The first royal judiciary body in New Spain was the *audiencia* of Mexico City, created by royal decree in 1527, which also carried executive and legislative powers. Two of the first four appointed judges died before arriving in Mexico City; another appointment was made, and in 1529 Nuño de Guzmán joined the two survivors. The performance of this group of royal representatives was critically evaluated by Bishop Juan de Zumárraga, who reported to the king on the abuses perpetrated by them. Between 1530 and 1535 the *audiencia* was presided over by Sebastián Ramírez de Fuenleal, who led a moralizing effort to correct abuses and to improve the conditions of the Indian population. The crown, however, was aware of the need to create a post that would carry the weight of royal authority beyond local allegiances. In 1535 control of the bureaucracy was handed over to Antonio de Mendoza, who was named the first viceroy of New Spain (1535–50). His duties were extensive but excluded judicial matters entrusted to the *audiencia*. Despite some wrongdoing, Mendoza accomplished much during his 15 years in the post. By 1550 the Viceroyalty of New Spain had a strong economy, and Mexico City had become an important center of European cultural life. Mendoza was responsible for the establishment of royal authority through justice, welfare, religion, and education in the colony.

Viceregal power was characterized by a certain amount of independence from royal control, mainly because of distance and difficult communications with the mother country. Viceroys were notorious for applying royal orders with discretion, using the maxim *Obedezco pero no cumplo* (I obey but do not comply). Viceroys and *audiencias* were in conflict most of the time, the latter reporting directly to the crown. The mother country exercised another means of control through the *visitadores* (royal inspectors). *Visitas* (inspections) either followed charges against colonial officials or were a simple matter of routine, and a *residencia* (a hearing that closely resembled a trial) was conducted at the end of an official's term. These and other checks and balances were more effective on paper than in reality because corruption and deception were rampant in the colonies.

Distribution of authority at the provincial and municipal levels was realized through officials called *corregidores*, *alcaldes mayores*, and *gobernadores*. The most important local administrative body was the *cabildo* or *ayuntamiento* (municipal council), which was responsible for the administration and settlement of disputes relating to the welfare and specific interests of the colonists.

By the end of the seventeenth century, the Viceroyalty of New Spain reached from New Mexico to Panama and also included Caribbean islands and the Philippines. In the most distant areas, local *audiencias* enjoyed greater autonomy, and viceregal authority was merely nominal. After the sixteenth-century expansion, the next 100 years would be marked by decline, even though the administrative structure transplanted to the New World would remain intact.

Socioeconomic Structures

The philosophy of mercantilism was the force behind all overseas ventures by European colonial powers. It emphasized that the most important function of colonial possessions was to enrich the mother country, making it stronger and more self-sufficient through the collection of the *quinto* (royal fifth) on all colonial production to the royal coffers. Trade protectionism favored manufacturers and merchants in Spain against competition from the colonies and placed strict restrictions on the colonial economies. As such, Mexico would supply raw materials to Spain, which would then produce finished goods to be sold back profitably to the colonies.

From the mid-sixteenth century on, land grants were provided to those willing to farm the land and raise livestock. The occupation of vacant lands near the towns encroached upon Indian villages. Displacement and/or fear of labor drafts in the early seventeenth century led entire villages to flee to the towns, mines, and haciendas, where Indians hired themselves out as artisans, servants, peons, or laborers. This close contact with the Spaniards was responsible for the Indians' acculturation and promoted intermarriage. The mestizos, who would play the dominant role in Mexican society and history, could trace their origins to this period of intense assimilation of the two cultures (see Ethnic Categories, ch. 2).

Agricultural production was directed to the internal markets, while exports mainly included precious metals. During the initial phase of the colonial period, gold had been collected from the Aztec treasures and from some mining operations. However, silver was the major discovery, and by the late sixteenth century it accounted for 80 percent of all exports from New Spain. Revenues from silver determined the quantity and frequency of trade; exploration and the search for mines led the Spaniards to the north, far beyond the Aztec empire. The mines of Zacatecas, Real del Monte, Pachuca, and Guanajuato were discovered between 1546 and 1552. Silver production continued into the seventeenth century, and it employed most available labor.

During the sixteenth century a dual economy developed in New Spain: the hacienda economy in the Valley of Mexico and the frontier economy of the mines to the north. By the mid-seventeenth century silver production collapsed, owing to a shortage of mercury (necessary to the refining process) caused by the diversion of shipments from Spain to the Peruvian silver mines of Potosí (in present-day Bolivia). The seventeenth-century mining crisis provoked bankruptcy among miners and *hacendados* (hacienda owners) and also had a negative effect on transatlantic trade. However, it promoted the domestic production of crude manufactures and foodstuffs for consumption by the growing Hispanic population in New Spain.

Colonial society was stratified by race and wealth. The three main groups were whites (European- and American-born), *castas* (mixed blood), and Indians; each had very specific rights and obligations in colonial society. The major type of privilege, the *(fuero)* (literally, forum, meaning a set of privileges) was vested in the right of an individual to be tried by one's peers. The church, the military, the bureaucracy, and the merchants enjoyed *fueros*. Later on, in the eighteenth century, even the miners had their special *fuero*. Social mobility into the upper classes was open to whites only, particularly Spaniards (who were known as *peninsulares,* referring to their birth in the Iberian Peninsula). Criollos (American-born whites, also known as creoles) tended to marry them for that reason. The lower classes were a mixture of poor whites, *castas*, and Indians who worked in the same occupations but who had different rights and obligations. Indians were protected from the Inquisition (the Roman Catholic court designed to combat heresy), paid head taxes, and could not own property as individuals but were the primary beneficiaries of social services in health and education. Mestizos (a caste of Indian-Spanish ancestry) were under the same obligations as the Spaniards but were not considered for most of the jobs in the Spanish administration, which were held only by *peninsulares*. Poor whites and mestizos often competed with Indians for the same jobs. Society was built on race and privilege, and the only unifying force was the Roman Catholic Church, which was guided by a doctrine of equality under the eyes of God. The clergy provided education and social services to the rich and the destitute alike, and it also functioned as a buffer in social conflicts.

Life in Colonial Mexico

Life in the Mexican countryside consisted of daily chores in the haciendas and mines. Few amenities existed, except for some religious festivities. Life in the cities was more interesting, for in the city were beautiful buildings, plazas, and markets, where people gathered to shop and gossip.

The churches gave room to artistic creation in architecture, sculpture, painting, music, and drama; it was in the churches that people congregated for major holy day celebrations, masses, weddings, baptisms, and other occasions. Patron saints' festivals were very elaborate, and people contributed their money and talents to them. The church was also the educational institution per se. Clergymen taught the Indians some Spanish in order to be able to evangelize and also maintained schools of higher education where young criollos were trained for the priesthood and government jobs.

Major works of scholarship were produced during the colonial period by such men as Motolinía (also known as Toribio de Benavente), Alonso de Zorita, Benardino de Sahagún, and other early historians, such as Bernal Díaz del Castillo and Cortés himself. However, the most outstanding writer of this era was a woman, Sor (Sister) Juana Inés de la Cruz (1651–95), whose poetry left a beautiful literary legacy in the New World.

There was another side to the beauty and refinement of the era, however. In the urban areas, and even in Mexico City, streets were dark by night and plagued by thieves, who were harshly punished whenever caught. Vagrants and beggars exposed their poverty and their wounds in the streets. Sanitary conditions were as bad in the colony as they were in Europe, and New Spain was fertile territory for the spread of newly introduced infectious diseases. Hospitals were first available to Spaniards only, but in time other institutions were founded to take care of Indians and mestizos. Conditions began to improve slowly toward the end of the sixteenth century, however, as a result of the efforts of both the government and the church.

The Road to Independence

The beginning of the eighteenth century in Spain coincided with the rise of the first Bourbon king. Spain had been ruined by wars abroad and conflicts at home. The new administration was determined to effect structural changes in governmental and economic matters and to promote a greater centralization in the king's hands. The colonies were also given some attention, mainly in terms of defense of their borders and of reorganization of their economies.

The Bourbon Reforms

During the reign of the third Bourbon king of Spain, Charles III (1759–88), important reforms were introduced at home and in the colonies. In 1765 he dispatched to New Spain a royal inspector, José de Gálvez, to survey the political, economic, and defense conditions in the colony. The north was still sparsely populated, and there was a threat of encroachment by foreign powers. To modernize the colony, higher taxes and tighter military control seemed to be necessary; to effect these changes, the political structure of New Spain was reorganized into 12 *intendencias* under a single commandant general in Mexico City, who was independent of the viceroy and reported directly to the king. Even before Gálvez' inspection, the first signs of change were already felt in Mexico by 1764, when two regiments of Spanish troops arrived in the area on a permanent assignment. The drafting of soldiers into a new militia force provoked riots throughout New Spain. Two of Gálvez' early policies were to transform the manufacture and sale of tobacco into a royal monopoly and to raise taxes exacted from local merchants.

The economic reforms were directed primarily at the mining and trade sectors. Miners were given *fueros* and were allowed to organize themselves into a guild. The emphasis on the crown's profits from mining generated strong measures against mercantile control of the industry. Free trade was introduced, and most Spanish ports were allowed to trade with the colonies, thus destroying the old monopoly held by the merchants of the Spanish port of Cádiz. The same was accomplished at the colonial ports of Veracruz and Acapulco. Thus, merchants and miners acquired a certain degree of financial independence, to the benefit of the crown.

The domestic colonial economy received little or no attention from the Spanish administration, which imposed additional restrictions on certain products. New royal monopolies were established for the production and sale of tobacco, gunpowder, and playing cards. A whole series of customs duties and excise taxes were added, and head taxes were instituted for Indians and mulattoes (the offspring of unions between whites and blacks). By the late eighteenth century New Spain was the most profitable Spanish colony; the collection of sales taxes and the tobacco monopoly provided the crown with three times the revenue of silver.

The Catholic church was a major target of the new, enlightened, Bourbon administration, and a period of conflict arose between the crown and the hierarchy of the church. Church interference on temporal matters and its increasing wealth and power were a permanent concern of the administration. Most of the time matters could not be settled because of the *fuero* and tax exemptions enjoyed by the clergy. But the religious orders could count on the lay population as their allies. The Society of Jesus (Jesuits) exercised additional influence over colonial society because they were the educators and the missionaries to the Indians in New Spain and were efficient financial administrators of bequests and inheritances left to the order for the upkeep of their schools, missions, and other properties. By the mid-eighteenth century the crown considered the Jesuits a menace to the prosperity of the Spanish Empire and demanded their explusion in 1767. In 1773 the order was suppressed by Pope Clement XIV, only to be reestablished in 1814 by Pope Pius VII. In New Spain the population opposed the measures taken against those who had been their teachers for so long and rose in a rebellion that was crushed with unusual force. Military presence in the colony thus acquired a new status, largely displacing the church as a mediating factor in the control of colonial life.

The Bourbon reforms changed the character of New Spain by revising governmental and economic structures and introducing a new concept of society. They prompted renewed migration of Spaniards to the colonies to occupy newly created government and military positions. At the same time, commerce was expanding, and independent merchants were also welcomed. The new monied classes of miners and merchants were the real promoters of the successes of the enlightened reforms enacted by the Bourbons.

Early Discontent: Criollos and Clergy

Economic expansion and a certain degree of relaxation gave rise to greater expectations by the colonists after the revolutions in France, Haiti, and the United States. Social stratification in New Spain, marked by discrepancies between rich and poor and criollo and *peninsular*, worked to prevent the necessary social cohesion for a revolutionary undertaking, even though the tensions continued to build.

Although criollos had been largely excluded from top government positions from the early years of colonization, there were exceptions to the rule. On Gálvez' recommendation, their participation was further restricted by the late eighteenth century except in the military, where criollos secured over one-half of the commissions. *Peninsulares* from all walks of life believed themselves superior to their American counterparts. In reaction to such discrimination, criollos showed pride in their achievements and valued the beauty of their land, language, customs, diet, arts, and people. They considered themselves subjects of the Spanish crown, however, and also abided by the doctrines of the Catholic church. As such, they did not want an egalitarian society—privileges were fine as long as they benefited from them.

The colonial church was the major institution allied to the crown in the expansionist ventures after the reconquest of Spain, and it shared power, prestige, and wealth with the temporal power. Before their expulsion in 1767, the Jesuits had performed important functions as educators, missionaries, and financial administrators. Two-thirds of the 678 Jesuits expelled from New Spain were criollos. The attacks on other church organizations continued, culminating in the Amortization and Consolidation Law of December 1804, which required the collection of all religious funds into the royal treasury. These funds were the result of continuous bequests to the church. Pious works, educational facilities, and masses were paid for through the church's revenues accrued as a real estate proprietor and lending institution. As such, the church provided loans to the local entrepreneurs, miners, and *hacendados*. The sudden request for the collection of all church funds into the royal coffers caused panic among its creditors and mortgagers, whose properties had to be sold at once. This greater supply of urban and rural real estate properties offered for sale provoked an economic crisis. Thus, although real estate prices plummeted, inflation soared, and some criollos were left financially bankrupt.

Meanwhile, in Europe, Napoleon Bonaparte invaded the Iberian Peninsula in 1808. When the news reached New Spain, considerable turmoil arose over the question of who would rule the colony in the absence of the legitimate king. The criollos of New Spain decided to help Viceroy Iturrigaray, and they proposed to constitute a junta (a provisional government body that was assembled in time of need) to govern the colony. *Peninsulares* realized the danger of such an association between criollos and the administration and thus orchestrated a coup d'état in 1808 to defend their privileges and standing in colonial society. After the coup, Iturrigaray was replaced by a senile puppet Spaniard, Pedro Garibay, much to the despair of the criollos. A combination of poor central government, bad harvests, drought, and inflation created the conditions for rebellion in 1810.

Wars of Independence

Hidalgo and Morelos

Miguel Hidalgo y Costilla was a criollo, born in 1753 in Guanajuato. After the expulsion of the Jesuits, he finished his studies with the Franciscans and finally joined the priesthood. Twenty-five years after his ordination, he became the parish priest of Dolores (in the present-day state of Hidalgo). He was more interested in secular activities than in the priesthood. Soon after arriving at Dolores, Hidalgo began to promote the establishment of various small manufacturing concerns. He realized the need for diversification of industrial activities in an area that had the mines of Guanajuato as its major clients. At the same time, during his seven years at Dolores, Hidalgo promoted discussion groups at his house, where poor Indians, mestizos, criollos, and *peninsulares* were welcomed. The themes of these discussions were current events, to which Hidalgo added his own input of social and economic preoccupations. The independence movement was born out of these informal discussions and was directed against Spanish domination of political and economic life in New Spain. A date was set for the beginning of the uprising, which would take place on December 8, 1810.

The plans were disclosed to the central government, and the conspirators were alerted that orders had been sent for their arrest. Pressed by this new development, on September 16, 1810, Hidalgo decided to strike out for independence without delay. (This date is celebrated as Mexico's Independence Day.) The church bells summoned the people, and Hidalgo asked them to join him against the Spanish government and the *peninsulares* in the famous Grito de Dolores (Cry of Dolores): "Long live Our

Lady of Guadalupe! Death to bad government! Death to the *gachupines* [slang for *peninsulares*]!" The people went wild, and the mob marched to Guanajuato, where the *intendente* (chief of the *intendencia*) was asked to surrender but decided instead to take refuge in the new granary building. The miners of Guanajuato joined forces with the Indians of Dolores in the massacre of *peninsulares* who dared to resist them, including the local *intendente*. In Guanajuato the old Spanish Empire began to lose its hold over the colony.

From Guanajuato the independence forces marched on to Mexico City after having captured Zacatecas, San Luis Potosí, and Valladolid. On October 30, 1810, they encountered resistance at Monte de las Cruces and, despite a rebel victory, lost momentum and did not take Mexico City. After a few more victories, the revolutionary forces moved north toward Texas. In March of the following year, the troops were ambushed in Monclova (in the present-day state of Coahuila) and taken to Chihuahua, where most of the rebel leaders were executed. Hidalgo was then tried by the Holy Office of the Inquisition and, once found guilty of heresy and treason, was condemned to death. On July 31, 1811, Hidalgo was executed by a firing squad. His body was mutilated and his head was displayed in Guanajuato as a warning to others.

Hidalgo met José María Morelos y Pavón at Colegio San Nicolás in 1790, where Hidalgo was the rector and Morelos a student. In 1792 both left the institution and lost contact with each other. In 1797 Morelos was ordained a priest. Hidalgo's *grito* brought them together again when Morelos refused to publish the ban of excommunication of Hidalgo in his parish. After the death of Hidalgo, Morelos assumed the leadership of the movement against Spanish domination. Morelos took charge of the political and military aspects of the insurrection and further planned a strategic move to encircle Mexico City and to cut communications to the coastal areas. In June 1813 Morelos convoked a national congress of representatives from all provinces, who met at Chilpancingo in the present-day state of Guerrero to discuss the future of Mexico as an independent nation. The major points included in the document prepared by the congress were popular sovereignty, universal male suffrage, Catholicism as the official religion, abolition of the slavery and *casta* systems, an end to government monopolies, and an end to corporal punishment. However, six months later the Spaniards broke the siege of Mexico City, captured positions in the surrounding areas, and finally invaded Chilpancingo. In 1815 Morelos was captured and met the same fate as Hidalgo

Until 1821 most of the fighting was done by guerrilla bands that had no cohesive plan. Out of these bands rose two men, Guadalupe Victoria (whose real name was Manuel Felix Fernández) in Puebla and Veracruz and Vicente Guerrero in Oaxaca, both of whom were able to command allegiance and respect from their followers. However, the Spanish viceroy, feeling the situation to be under control, was confident enough to issue a general pardon to every rebel who would lay down his arms.

Iturbide and the Plan of Iguala

Agustín de Iturbide was a criollo born in 1783 in Valladolid. At the time Hidalgo issued the Grito de Dolores, Iturbide joined the Spanish military forces against the rebels. In 1820 the viceroy appointed him commander of an army to combat Guerrero's fighters in Oaxaca. Once the confrontation broke out, Iturbide asked Guerrero to join forces with him, and together they issued the Plan of Iguala on February 24, 1821, to the dismay of the viceroy. The most important part of the plan was the establishment of three guarantees: a constitutional monarchy, a religious monopoly for the Catholic church, and equality of rights for *peninsulares* and criollos. A new army, the Army of the Three Guarantees, was then placed under Iturbide's command to protect the implementation of the Plan of Iguala. The plan was clever, and it pleased both patriots and loyalists alike. The ideas of independence and the protection of Roman Catholicism brought together all factions.

Iturbide's army was joined by rebel forces from all over Mexico. When the rebels' victory was certain, the viceroy resigned. But the Spanish administration was still not convinced of the seriousness of the movement. Upon the resignation of Viceroy Apodaca, a new captain general, Juan O'Donojú, came from Spain. On September 27, 1821, as representatives of the Spanish crown and Mexican forces, O'Donojú and Iturbide signed the Treaty of Córdoba, which recognized Mexican independence under the terms of the Plan of Iguala. Iturbide, a former royalist who had become the paladin for Mexican independence, included a special clause in the treaty that left open the possibility for a monarch to be appointed by a Mexican congress if no suitable European royalty would accept the Mexican crown.

Before the unifying Plan of Iguala, the issue of Mexican independence had divided the country; criollos had been part of both the rebel forces and the forces of repression. Ironically, however, *The church at Dolores, where Father Hidalgo issued the grito for independence in 1810 Photo by Kathryn R. Stafford*

it was those who believed in the establishment of a Mexican monarchy who brought unity among the criollo population and finally achieved independence for Mexico. The final victory was achieved by the Army of the Three Guarantees, which suppressed the rebellion, and by the conservative factions of the church. In the end, the traditional upper classes maintained their loyalty to the idea of a monarchy.

Agustín I, Emperor of Mexico

According to the Plan of Iguala, a provisional government was set up while an independent Congress deliberated on the future of the nation. They were able to agree on two major issues: to cut the size of the Army of the Three Guarantees and to determine the eligibility of officials for the planned regency that eventually would replace the provisional government. Iturbide felt that power was slipping from his hands and decided to stage a dramatic demonstration on his behalf. On the evening of May 18, 1822, the troops were ordered to march through the city, shouting "vivas" on their commander's behalf. The demonstration by the Army of the Three Guarantees was joined by other soldiers and by the populace as it proceeded toward Iturbide's residence. "Viva Agustín I, Emperor of Mexico!" was the acclamation, to which he pretended surprise. The following day he went to Congress, followed by his clique, and left as constitutional emperor of Mexico. The arrangements for the coronation were pretentious but still in accord with Iturbide's understanding of the Mexican ethos. Iturbide realized the importance of the monarchy for colonial stability and control, and he decided to take full advantage of tradition.

Serious economic problems faced the new empire. After the wars the public coffers were empty, the rural economy was ruined, trade with Spain had ended, and the bureaucracy had grown. Some tax adjustments were tried, but the results were meager. In Congress, discontented factions sharply criticized the government, and Iturbide's recourse was to dissolve the legislative branch of the government and to have all opposition delegates arrested in August 1822. In Veracruz, the commander of the garrison, Antonio López de Santa Anna Pérez de Lebrón, rose against Iturbide and proclaimed a republic on December 1, 1822, only to be joined by other revolutionaries—Vicente Guerrero, Nicolás Bravo, and Guadalupe Victoria. Together, they drew up the Plan of Casa Mata on February 1, 1823. By mid-month, Iturbide, realizing the failure of his efforts, abdicated the throne. Rebel forces encountered no opposition when they arrived in Mexico City. The experience of an empire had failed, and the idea of a monarchical system for Mexico would be dismissed for quite some time. Iturbide's excesses had worked to the benefit of the republicans.

The Mexican Republic

The Constitution of 1824

After the fall of the empire, a provisional government was installed, consisting of Bravo, Victoria, and Pedro Celestino Negrete. Delegates were elected to the Constitutional Congress that entered into session on November 27, 1823. There were two major factions: the federalists, who were supported by the liberal criollos and mestizos and who embraced the ideals of the revolutions in France, the United States, and Spain for constitutional governments, and the more conservative centralists, who drew their allegiance from the clergy, the landowners, and the military.

The constitution of 1824 organized the United Mexican States (Estados Unidos Mexicanos) as a federal republic composed of 19 states and four territories. Power was distributed among three branches of government: the executive, the legislative, and the judicial. Legislative power was wielded by the Senate and the Chamber of Deputies, while executive power was exercised by a president and a vice president elected by the state legislatures for a tenure of four years. In spite of the liberal outlook of the constitution, certain traditional privileges were maintained: Catholicism remained the official religion, the *fueros* were retained by the military and clergy and, in case of emergency, the president could exercise unlimited powers.

During the administration of Mexico's first president, Victoria, economic conditions became even more critical, proving to the criollos that there was more behind the economic decline than bad management by *peninsulares*. One of the government's major burdens was the assumption of all debts contracted during the colonial period. Victoria's presidency ended in 1827, when he became the victim of a coup d'état led by Vice President Bravo. The next presidential elections were won by the centralist candidate but, after a short rebellion, the defeated candidate, Guerrero, became president. Guerrero's most significant measure was the abolition of slavery in September 1829. The last Spanish attempt to regain control of Mexico had taken place in July 1829, but military operations against the invaders were placed in the hands of Santa Anna, a man who had participated in several military campaigns and who, by October 1829, finally expelled the Spanish troops from Mexican territory. Once again, the vice president led a rebellion against the government that culminated in the arrest and execution of Guerrero in 1831. Santa Anna came to the rescue of the liberal faction and immediately returned to his estate at Veracruz.

Life in Early Nineteenth-Century Mexico

The Wars of Independence took their toll on the Mexican population. It seemed that overall conditions had changed little in Mexican society; the *peninsulares* had left Mexico, only to be replaced by their criollo counterparts. Society continued to show stratification between rich and poor, particularly in the urban areas. Mexico City was the center of the country's political and intellectual life, the seat of government, the seat of schools of higher education, and the seat of culture, having botanical gardens, libraries, and social amenities. The streets were clean, and they bustled with people and carriages. The shops offered the latest European fashions; people dressed the part of an urban aristocracy of wealth. But there were also the street beggars, the urban poor, high illiteracy, and other kinds of social malaise.

In spite of political independence from Spain, the old mother country was still the standard used for measuring worth. A basic, negative feeling permeated a society that was determined to deny the validity of its past. Everything Spanish was unacceptable, and the intellectuals followed a pattern of criticizing the past without proposing a different course for the present or the future of society.

Santa Anna

Antonio López de Santa Anna Pérez de Lebrón was a criollo from Veracruz; he was born in 1794. As a cavalry officer, he supported Iturbide against Spain in 1821 but, two years later, through the Plan of San Luis Potosí, he was instrumental in forcing the abdication of Iturbide and the establishment of a liberal government under the constitution of 1824. Santa Anna's career culminated with his election to the Mexican presidency in 1833, a position he occupied on numerous occasions during the next 22 years. His interventions in both domestic and foreign affairs were characterized by the personality of a military strongman (caudillo), a trait that would dominate Mexico through the mid-nineteenth century.

Santa Anna's bravery, energy, and organizational abilities were overshadowed by his vanity, cruelty, and opportunism. His record of heroism in victorious battle, his bold interventions in the political life of the country, and his shifts from one side of the political spectrum to the other reflected the vacillation and insecurities of Mexican nationalistic hopes of the times. But he saw himself as the paladin of Mexico against foreign invasions; even the loss of Texas in 1836 represented contemporary Mexican society at large, battling in a climate of disunity and serious mistakes.

The Loss of Texas

Texas had been part of New Spain since the early colonial period. In 1821, in an effort to colonize and populate the area, the Spanish commander in Monterrey granted a concession to a United States pioneer, Moses Austin, to settle the area under the Catholic faith. Land could be acquired for a nominal charge of $0.25 per hectare, and soon colonists from the United States started to pour into the area. By 1835 they outnumbered the Mexicans, four to one. The area had no autonomous government and was politically attached to the state of Coahuila. Meanwhile, Mexicans feared incursions by North Americans and the possibility of losing Texas to the United States. Restrictions were placed on the future immigration of American colonists, and slavery was abolished in 1829 in hopes of discouraging United States Southerners from moving to the area. Finally, Santa Anna's move to bring Texas under the political domination of Mexico City pushed the Texans to secede from Mexico on November 7, 1835, and to declare their independence in March 1836.

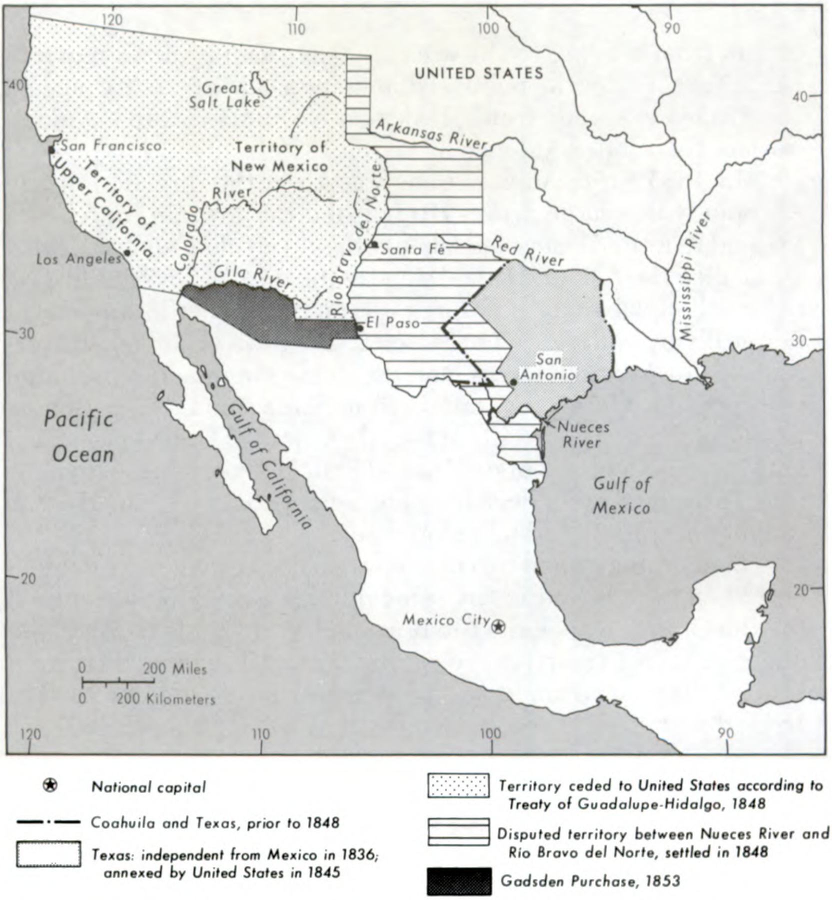
In 1835 Santa Anna marched north in the direction of San Antonio with a large army. He reached the town in March and learned that the Texans had taken refuge at an old Franciscan mission called the Alamo. He laid siege to the mission for several days before the final attack on March 6. The bloody battle was fought heroically by both sides. On March 23 the town of Goliad was surrounded by Mexican forces, and the Texan commander in charge surrendered. On express orders from Santa Anna, 365 prisoners were executed. The events at the Alamo and at Goliad prompted anti-Mexican feelings in the United States. Troops began to pour into Texas to stage a decisive blow against Santa Anna. He was caught on April 21 and taken prisoner.

Santa Anna signed two treaties with the Texas government—one to end the hostilities by removing his troops to the south of the Rio Grande (called the Río Bravo del Norte in Mexico) and the other, a secret treaty, to recognize Texan independence from Mexico. Texas remained an independent republic from 1836 to 1845; this status was recognized by the United States in 1837.

The Mexican-American War

After independence, the idea of incorporating Texas into the United States gained support both in Texas and in the United States Congress. In 1845 the United States Congress passed a resolution in favor of the annexation of Texas, which prompted Mexico to sever diplomatic relations with the United States. Nevertheless, the United States sent a special envoy to negotiate the United States-Mexico boundary with the Mexican government. Traditionally, the western boundary of Texas with the United States had been the Nueces River; United States colonization, however, had spread beyond the Nueces as far as the Río Bravo del Norte. The United States special envoy made a claim to the region, which encompassed about one-half of the present-day states of New Mexico and Colorado, in addition to part of Texas. Mexico rejected the claim; the United States then developed pretensions to acquire still more Mexican territory (see fig. 3.)

In 1840 Santa Anna was called once again to lead the Mexican troops against a foreign threat. The United States troops attacked on three fronts: one column occupied California and New Mexico, another column entered northern Mexico, and a third detach-


120
110
100
90
40
30
20
UNITED STATES
Great Salt Lake
Arkansas River
San Francisco
Territory of New Mexico
Territory of Upper California
Colorado River
Rio Bravo del Norte
Santa Fé
Red River
Mississippi River
Los Angeles
Gila River
El Paso
San Antonio
Pacific Ocean
Gulf of California
Nueces River
Gulf of Mexico
Mexico City
0 200 Miles
0 200 Kilometers
National capital
Coahuila and Texas, prior to 1848
Texas: independent from Mexico in 1836; annexed by United States in 1845
Territory ceded to United States according to Treaty of Guadalupe-Hidalgo, 1848
Disputed territory between Nueces River and Rio Bravo del Norte, settled in 1848
Gadsden Purchase, 1853

Source: Based on information from Cathryn L. Lombardi, John V. Lombardi, and K. Lynn Stoner, *Latin American History: A Teaching Atlas*, Madison, 1983, 50, 53.

Figure 3. Mexican Territorial Losses to the United States, 1836–53

ment went to Mexico City. California and New Mexico fell without much bloodshed. Northern Mexico was the scene of fierce battles under Santa Anna's leadership, but his vacillation permitted the United States troops to occupy the northeast and to start an offensive from the Gulf coast. The United States Army of Occupation landed at Veracruz on March 9, 1847, and proceeded to neutralize the supply lines, heavily bombarding the city. Veracruz surrendered on March 27; the death toll was fewer than 70 Americans and more than 1,000 Mexicans.

In Mexico City the situation was chaotic. Politicians continued to fight their petty battles, which further emphasized a pervasive lack of union, leadership, and objectivity. President once again, Santa Anna denounced both Congress and his own subordinates in the executive branch for their lack of support for the resistance of Mexico City. They in turn denounced him for his failures in battle. On August 20 the Army of Occupation asked for the surrender of Mexico City, but the battle continued until September 13, 1847, when the last bastion of Mexican resistance fell during the famous Battle of Chapultepec, in which young cadets from the Mexican military academy (the "Niños Héroes") leapt to their death rather than surrender. The United States victory marked the end of the war and the beginning of peace negotiations.

Treaty of Guadalupe Hidalgo

According to the terms of the Treaty of Guadalupe Hidalgo of February 2, 1848, the boundary between Mexico and the United States was established at the Río Bravo del Norte. Mexico was then required to relinquish its territories of New Mexico and Upper California (the present-day states of California, Arizona, New Mexico, Nevada, Colorado, and parts of Utah and Wyoming) and to accept the United States' right to Texas. As compensation, the United States agreed to pay US$15 million for the territories and to assume more than US$3 million in claims from private citizens of these areas against the Mexican government. Mexico lost more than one-half its territory. National humiliation did not bring a more unified feeling than war itself. Mexicans were bitter over the defeat, and their feelings were aggravated by a collective inferiority complex and a deep distrust of "gringos."

Santa Anna's last political venture resulted in the sale of more Mexican territory. In 1853, in what is known in the United States as the Gadsden Purchase, he sold 77,692 square kilometers of land in southern New Mexico and Arizona for US$10 million. As a result, he completely alienated a large, liberal, reform-minded group of young Mexicans who conspired to oust him.

The Reform and the French Intervention

The Revolution of Ayutla and the Reform Laws

The Mexican Reform movement had its origins in the liberal ideas of the French philosophers, such as Voltaire, Jean-Jacques Rousseau, Honoré de Balzac, and Pierre Joseph Proudhon, whose views were taken up by a group of Mexican intellectuals who shared a strong commitment to moralize Mexican politics.

The most outstanding member of the group was Benito Juárez, a full-blooded Zapotec Indian turned lawyer and politician. These men went into exile, and in Louisiana they drew up the Plan of Ayutla in 1854 for the overthrow of Santa Anna. The plan gained broad-based support, and the conspirators began to return to Mexico. In August 1855 Santa Anna resigned at last.

A provisional government was installed under Juan Álvarez and the intellectuals of Ayutla; the ensuing period became known as the Reform. It was the Mexican version of the French Revolution against feudalism and privileges, and its goal was to curtail the old *fueros*. The intent of the Reform was to replace anarchy and dictatorial rule with a parliamentary democracy that would guarantee civil liberties and freedom, and that would promote material progress and equality. Several laws were passed, such as the Juárez Law, the Lerdo Law, the Comonfort Law, and the Iglesias Law, which abolished the *fueros*, curtailed ecclesiastical property, introduced a civil registry, and prohibited the church from charging exorbitant fees for administering the sacraments.

The Reform Laws provoked many tensions at a time that delegates were preparing the constitution of 1857, as provided for in the Plan of Ayutla. The new constitution was very much like that of 1824, but it reflected a more liberal vision of society through its incorporation of the Reform Laws. It reaffirmed the abolition of slavery and secularized education, and it guaranteed freedom of religion, the right of citizens to bear arms, and the right of habeas corpus. Both the Reform Laws and the constitution divided the people and prompted a civil war.

Civil War and the French Intervention

The civil war, commonly known as the War of the Reform, that plagued Mexico between 1858 and 1861 brought to light the underlying conflicts that had been present in Mexican society since independence. The conservative faction launched the Plan of Tacubaya and, with the support of the military and the clergy, it dissolved Congress and arrested Juárez. Juárez escaped and established a "government in exile" in Querétaro (the liberals later moved their capital to Veracruz). The initial advantage was held by the conservatives, who were better armed and had plentiful supplies, but by 1860 the situation was reversed. The final battle took place at San Miguel Calpulalpán just before Christmas 1860. The victorious liberal army entered Mexico City on New Year's Day.

In March 1861 Juárez won the presidential election, but the war left the treasury depleted. Trade was stagnant, there was a lack of transportation, and foreign creditors were demanding full repayment of Mexican debts. Juárez proceeded to declare a moratorium on all foreign debt repayments. In October 1861 Spain, Britain, and France decided to launch a joint occupation of the Mexican coasts to force repayment. In December troops from the three nations landed at Veracruz and began deliberations. Because the representatives of the three nations could not agree on the means to enforce the collection of the debt, Britain and Spain recalled their men. The French remained and proceeded to occupy Mexico.

In Puebla the French troops encountered strong resistance led by one of Juárez' trusted men, General Ignacio Zaragoza, who defeated the foreigners on May 5, 1862. The following May, Puebla was surrounded once again by French troops, who laid siege to the city for two months until it surrendered. The fall of Puebla meant easy access to Mexico City, and Juárez decided to evacuate the capital after receiving full approval from Congress.

The French encountered no resistance to their occupation of Mexico City. In June 1863 a provisional government was chosen, and in October a delegation of Mexican conservatives invited Ferdinand Maximilian Joseph of Austria to accept the Mexican crown, all according to the plans of French emperor Napoleon III. Maximilian was a well-intentioned monarch who believed that his acceptance responded to the desire of a majority of Mexicans. Before departing for Mexico, Maximilian signed an agreement with Napoleon III in which the former assumed the debts incurred for the upkeep of the French army in Mexico. By the time Maximilian arrived in Mexico, he had made commitments three times the size of the total Mexican foreign debt.

The conservatives in Mexico expected Maximilian to act against the Reform Laws, but this did not happen. Mexican liberals tried to appeal to the United States on the basis of the French violation of the 1823 Monroe Doctrine, but at the time the United States was involved in its own Civil War. The end of the Civil War in the United States prompted a more favorable United States foreign policy toward Mexico and released manpower and arms that were directed to Mexico to help Juárez in his fight against the French. By November 1866 Napoleon III had started to recall his troops stationed in Mexico. Armed conflict resumed on February 19, 1867, and on May 15 Maximilian surrendered. He was tried and then executed on June 19.

The French invasion had some positive results, such as a republican victory in favor of the ideals of the constitution of 1857. On the negative side were a ruined economy and an empty treasury, which led to political and economic problems in the coming years.

The Restoration

Juárez

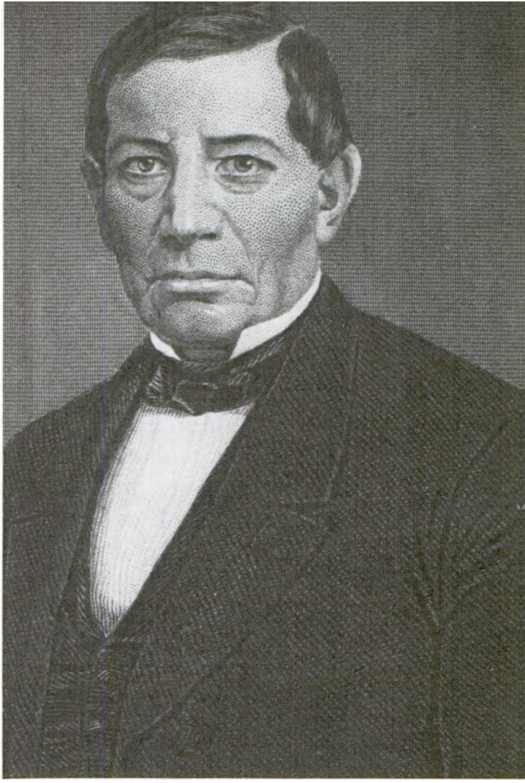
The liberal republicans under Juárez' leadership undertook the task of consolidating the victory of the principles of the constitution of 1857. The Restoration was marked by peace and tolerance toward the conservatives. Juárez returned to Mexico City on July 15, 1867, called for presidential elections, and presented himself as a candidate. By the end of the year he was victorious.

The two areas that became crucially important to his administration were the economy and the educational system. Economic development was based on the improvement of communications, the utilization of the country's natural resources, and the revamping of the mining sector through favorable tax guidelines. There was a lack of investment capital because of political instability and the unsafe conditions in the countryside. Juárez reorganized the *rurales* (the rural police force) and in 1869 placed it under the Department of Interior. The *rurales* were responsible for the security of the roads, cargo, and the rural transportation system in general. The improvement of communications began with the completion of the railroad that linked Mexico City with Veracruz, a British venture that had been started during the reign of Maximilian, on January 1, 1873.

In the area of education, a complete reorganization was directed by Gabino Barreda. He devised a school curriculum that concentrated on mathematics and the physical sciences. For the first time education became mandatory. However, this liberal aspiration for literacy and schools open to all was not fulfilled.

At the end of his term, Juárez decided to seek reelection. His opponents were José de la Cruz Porfirio Díaz and Sebastián Lerdo de Tejada, whose candidacies divided the liberal faction and resulted in none of the candidates' receiving a majority of the votes. It was then up to Congress to choose among the three candidates or to reelect the incumbent president, and it chose Juárez. Díaz invoked the principle of no reelection in the constitution of 1857 and revolted in November 1871. On July 18, 1872, amidst the Díaz rebellion, Juárez died of a heart attack.

New elections were called, and Lerdo won the presidency. His administration was characterized by a continuous effort to bring peace to the country, and he intervened in the countryside whenever needed. Lerdo maintained the emphasis on communi-



Benito Juárez
From the collection of the
Library of Congress

cations through new railroad and telegraph lines. In education he directed his energies into the construction of new schools and the higher enrollment of students. He established diplomatic relations with France, and overall his administration bred positive results. But when the time came for the election of the new president, Lerdo showed interest in another four-year term. Díaz rose in rebellion a second time in March 1876, again defending the no reelection principle. Lerdo went into exile in the United States, and on November 21, 1876, Díaz occupied Mexico City. A political mastermind, he remained there for 30 of the next 34 years. The modernization that came to characterize the Porfiriato (the period of Porfirio Díaz' rule) in reality was started during the Restoration, which was to become an interregnum between times of political instability and long periods of order by force.

Life in Mexico in the Mid-Nineteenth Century

Despite attempts at modernization by Juárez and Lerdo, Mexico in the 1870s was still very rural. Little had changed; social barriers continued to exist between rich and poor, white and mestizo. People in the countryside were still living through the fears of past wars. Bands of outlaws plagued the roads. The working class lived under subhuman conditions, while the self-employed fared little better by selling goods in the streets; domestic servants were the only ones who could enjoy a clean room and food at their employers' houses. The rich continued to do well and had become more refined after the period of French rule. The novelty in mid-nineteenth-century society was the emergence of a small middle class of businessmen and white-collar officials who did not enjoy the privileges of the upper class but who lived decently.

The cultural life of the times had broadened. The French had brought with them many ideas and had tried to implement them, but the public's resentment of the foreigners aborted their initiatives. A certain national consciousness had developed through the years of French occupation, however, and had been translated into the popular arts and literature, in which Indians and the poor were portrayed as deserving something better simply because they were Mexicans.

Positivism was a system of ideas that became very popular in the late nineteenth century. Its origins were in the philosophical writings of French intellectual Auguste Comte (1798–1857), who perceived the evolution of the history of mankind as developing in stages. Those stages evolved from an initial period dominated by superstition and abstract principles to a final period characterized by the perception of reality through progress that was accomplished in an orderly way. In Mexico, positivism was introduced by Gabino Barreda (1818–81), who adapted the ideas of Comte to the development of Mexican history. Order and progress were the most important objectives of society, which in the case of Mexico was to be governed by a criollo elite. The next generation of Mexican liberals would be faced with both order and progress, but at the expense of individual freedoms.

The Porfiriato

Porfirio Díaz was born in 1830 to a low-income family from Oaxaca. He never finished his law studies and joined the army instead. He took the liberal side during the War of the Reform and fought the French in Puebla. Díaz rebellions against Juárez and Lerdo were against presidential reelection and, therefore, in the liberal vein of the constitution of 1857.

México in 1876 was not very different from years past but for a few incipient signs of modernization that had begun to appear during the Restoration. There were still sizable economic problems in agriculture and mining; problems of transportation and lack of decent port facilities; banditry, epidemics, floods, lack of drainage, and a high mortality rate; and, to make matters even more difficult, there was no money.

During his first four years in office, Díaz began to tackle the national economy and placed stiff measures against contraband while creating consular posts along the United States border. Smugglers and bandits crossed the border from both sides, but the president would not permit United States troops to enter Mexico in search of them. Instead, he enlarged the Mexican border patrol. In 1877, after Díaz agreed to honor US$4 million in claims by United States citizens against Mexico, the United States government finally recognized the Díaz government. In 1880, at the end of his term and despite his followers' wishes, he left office. The next president, Manuel González, led the country through a continuation of the modernization program (telegraph lines began to operate, railroad construction was kept apace, and so on). In fulfilling his foreign debt obligations, González stopped paying government officials, a move that led to a harsh campaign against the president. But this time there were no attempts to oust him.

Meanwhile, during González' tenure, Díaz gathered a large following that brought him back to office in 1884. Mexican positivism, embodied in the slogan "order and progress," was the backbone of the modernization scheme supported by the intellectual followers of Barreda, known as *científicos*. There were material signs of Díaz' determination: telephones, telegraph, underwater cables, public health improvements, public works, and construction of public buildings. The *científicos,* who were led by José Ives Limantour, served as advisers to Díaz and developed a plan for economic recovery that was to be carried out through the next 27 years of the Porfiriato and that was to include the revision of import duties and restrictions and administrative control over the performance of government officials. Such a healthy political and economic climate brought notice to the Mexican administration abroad, and foreign investors began to pump their capital into Mexico (see Growth and Structure of the Economy, ch. 3).

The Railroad, Mining, and Oil Industries

By 1890 there were almost 3,200 kilometers of railroad track in Mexico held by three companies: the Mexican Central Railroad Company, the Mexican National Railroad Company, and the Sonora Railroad Company. In 1894 the coast-to-coast Tehuantepec Railroad was completed, but it soon became obsolete after the opening of the Panama Canal in 1914. Mexican railroads had expanded from 640 kilometers of track in 1876 to a grand total of 24,000 kilometers of track by 1911. The advent of the train brought modernization to distant areas connected by the railroads.

Investment capital was lured by a new mining code in 1884 that did not enforce ownership of subsoil reserves by the government. (According to an old Iberian legal tradition, these reserves belonged to the state, while exploration rights could be granted to individuals.) Mining taxes were also revised to attract investors. Modern mining technology provoked a boom in the industry and produced large revenues for investors and for the country. Between 1877 and 1908 the production of gold rose 26 times in value, while silver more than tripled its revenues in 1877 alone. Fortunes were made overnight, and in some cases money from mining went into other productive sectors of the economy. There were increased investments, for example, in agriculture and cattle raising.

Foreign investments competed for oil exploration concessions. United States capital and technology founded the Mexican Petroleum Company to exploit oil found near Tampico and Tuxpan along the Gulf coast; British investments went into El Águila Company, which started oil operations in the Isthmus of Tehuantepec and then moved to the states of Veracruz, San Luis Potosí, Tamaulipas, and Tabasco. The British concession was the most successful in the long run; it became the major company in the infant Mexican oil industry and would later transform Mexico into one of the major oil producers in the world.

In addition to these industries, Mexico maintained a certain level of growth in the manufacture of other products, such as cement, textiles, tobacco, bricks, and beer. Even the steel industry in Monterrey, the industrial center of Mexican development, continued to grow. All of this was made possible by overall improvements in the tariff system and in the infrastructure of ports, transportation, and long-distance communications. Mexican credit abroad was considered very sound, but the people saw the changes in a much deeper way—in terms of a restored national pride.

Modernization Versus Inequalities

The modernization program was brought about at the expense of personal freedom. Díaz made certain that "order" was maintained at all costs for the sake of "progress." Force was used whenever necessary to neutralize opponents of the regime, and there was no freedom of the press. The army and the *rurales* were the forces of repression for the maintenance of the Porfirian peace. Mock elections were held at all levels of government, while Díaz appointed his loyal friends as political bosses. Despite all of the modernization, Mexico was still very rural, and class stratification was entrenched.

Land values increased tremendously with the advent of railroads. It was imperative to have clear title to the land; otherwise, counterclaims could be filed to dispute landownership. Thus, Indian communities lost much of their traditional holdings to the *hacendados*, who held the land and the workers captive through debt peonage for life. All went well for the wealthy, and a dictatorial regime kept the rest of society under control.

The most important development in Mexico during the 30 years of Díaz' "reign" was the growth of the middle sectors of society: white-collar workers, priests, artisans, and small businessmen. There was no class consciousness, but rather a tremendous identification with the models set by the upper class in language and mores and in the image presented by the middle classes. The differences between rich and poor were further aggravated. However, Porfirian Mexico was aware of the stigma that poverty brought to society. The normal practice was to hide the poor, even if by force. During the commemoration of the one-hundredth anniversary of independence in 1910, the Porfiriato had no qualms about barring the poor from Mexico City. It was a question of presenting a good image of the country to foreign dignitaries.

Mexican cultural and intellectual life during the Porfiriato was encouraged as long as the glories of the regime were depicted and its control was not challenged. In the arts and in architecture, only foreign styles were acceptable. Liberal intellectuals, however, continued to voice their opposition to such controls over intellectual expression.

The Revolution

The Porfiriato was marked by the constant violation of the principles of the constitution of 1857. Díaz had been responsible for all kinds of excesses by favoring foreign interests above those of the Mexican peasants and workers, allowing the clergy again to become openly influential in temporal matters, and giving the army a free hand to violate guaranteed civil liberties while opponents to the regime were either co-opted or sent to jail. The "order" that had been maintained for so long was abruptly disrupted in 1910.

Liberal writers and journalists challenged the regime throughout the Porfiriato, but their attacks had become more coordinated with the organization of liberal clubs and a liberal convention at San Luis Potosí in 1900 and 1901 that defended the principles of the constitution of 1857. For the next two years, liberal congresses were held, but the persecution of representatives led many liberals to seek asylum in the United States. The exiles (the Flores Magon brothers, Juan Sarábia, Antonio I. Villareal, Librado Rivera, and others) issued a liberal proclamation on July 1, 1906, from St. Louis, Missouri, that called for the overthrow of Díaz, and they started a publication, *Redención*, to set forth their ideas. The Mexican Revolution was born out of the liberal program, which later would be incorporated into the Constitution of 1917. The program presented in the proclamation of St. Louis introduced new concepts in education, labor relations, land distribution, and agricultural credit. These ideas reached the Mexican workers through issues of *Redención* smuggled across the border. In 1906 and 1907 strikes broke out among the Cananea (in Sonora) mining workers and the textile workers of Río Blanco (in Veracruz), both of which were brutally suppressed by force.

In 1908 an unexpected development brought back real hope to the Mexican people. In an interview with an American reporter, Díaz stated that he would not seek reelection in 1910, and liberals and intellectuals immediately started their political campaign. The most important document of the period was a book by Francisco I. Madero, *The Presidential Succession of 1910*, in which he emphasized universal suffrage and no reelection.

Madero was born in 1873 into a wealthy family in the state of Coahuila. After receiving an upper-class education in Paris and at Berkeley, California, he returned home to take care of the family's business enterprises. Exposure to the hacienda environment and to the workers' complaints made him aware of social inequalities, while Díaz' interventions in local politics broadened his understanding of the underlying political causes of the problems, convincing him that only a major change in the political structure of government could lead to solutions in other areas. Madero campaigned in 22 states and in April 1910 was nominated as the liberal candidate for the next presidential election. In June, partly as a result of the mass repression and imprisonment of the anti-Díaz political opposition, Díaz won reelection. Madero, himself imprisoned, was released from jail and soon escaped to the United States.

Meanwhile, Díaz was busy preparing a joint celebration—the one-hundredth anniversary of Mexican independence and his eightieth birthday in September. Mexico City went through a full refurbishing—buildings were dedicated, monuments were un-

Francisco I. Madero (above)
Porfirio Díaz (right)
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veiled, and champagne was consumed like water during the balls and celebrations attended by the entire diplomatic corps. The streets of the capital were cleared of refuse and undesirables in order to present foreigners with a certain picture of the society created by the Porfiriato. The facade was European, but the underlying problems were Mexican. The grievances of an entire nation would soon engulf Mexico in a violent struggle for land, liberty, and democracy.

The Military Phase

In October 1910 Madero drafted the revolutionary Plan of San Luis Potosí, which called for coordinated revolutionary action to begin on November 20. Copies of the plan were circulated, and the people who revolted were in agreement that Díaz was responsible for their suffering under foreign capitalists, *hacendados,* local political bosses, and rampant corruption. People from all walks of life joined the fighting forces against the dictatorship of Díaz. By January 1911 the revolutionary forces had won significant victories in the state of Chihuahua, and soon the revolution spread through Sonora, Coahuila, Sinaloa, Veracruz, Zacatecas, Puebla, Guerrero, and Morelos. The rebels had the advantage of moving in small units and of having the support of the people in the countryside, while the military depended on supply lines and coordination from the central government. In March 1911 a presidential decree suspended all civil liberties in the country, which allowed anyone concerned with maintaining the status quo to use force against the opposition.

Zapata and Villa

Emiliano Zapata was born in 1877 to a family of poor peasants from the state of Morelos. Zapata followed his parents' ways and worked the land that they had traditionally owned but that was taken away by rich *hacendados* who were protected by the government. Zapata became the spokesman for other peasants from Morelos in their attempts to recover their lands legally. However, he found the situation hopeless and dared to tell them to take up arms against the government that had allowed such abuses against peasants. In response to his rebellious attitude, Zapata was drafted for military service in 1908. Thanks to the interference of a rich *hacendado* who liked Zapata as a worker on the land, he was released from service. He then joined the antireelectionist forces in the southern front centered in Morelos.

Doroteo Arango was born in Durango on October 4, 1877. At age 16 he killed a man for abusing his younger sister, fled to the mountains and, to evade the law, changed his name to Francisco (Pancho) Villa. For the next 15 years Villa was a cattle rustler and a bandit, too wise and too fast for the *rurales* to catch, but sometimes he worked the land. During this period, the Plan of San Luis Potosí was issued, and Villa was persuaded to join the revolutionary forces of Madero. After Madero's victory, Villa remained in the leadership of an irregular army.

The Fall of Díaz

By the time the attack on Ciudad Juárez brought Villa and Madero together, Madero (who was exiled in Texas at the time) was head of a provisional government recognized by the revolutionary forces. Madero vacillated in ordering the attack, fearing intervention from United States forces stationed in El Paso. In the end the revolutionaries took the city on their own initiative. Vacillation had been met with disobedience and underscored the dissension between the political leadership and the military forces. The war was impeded by fighting among various revolutionary groups, but the widespread fighting had one very positive result: the resignation of Díaz, who realized that his long reign had ended by the will of the Mexican people. On May 25, 1911, the 80-year-old dictator presented his resignation to Congress. An interim government was appointed, and Madero triumphantly returned to Mexico City.

Among the people waiting to greet him was Zapata. He had come to claim the land for the peasants of Morelos, which was the only acceptable result of the overthrow of the Díaz regime. Instead, Madero ordered him to disband his troops, and, reluctantly, Zapata acceded to Madero's request. The interim government did not think Zapata was demobilizing fast enough, however, and sent federal troops to disarm the revolutionaries by force. Even though Madero was not responsible for this action, Zapata withdrew his support for him. Finally, new elections were held in October, and in November 1911 Madero assumed the presidency.

Madero's Government

The fall of Díaz raised popular expectations of the new government. Madero soon realized that to the liberals, the Revolution meant political change, but to the Revolutionary fighters it meant radical social and economic transformations that Madero would not be able to fulfill. Madero dealt with the labor and land tenure problems politically through the National Agrarian Commission and the Department of Labor. The only tangible change was that labor groups felt free to organize, and they founded the House of the World's Workers as a meeting place for labor discussions. They were also allowed to publish the newspaper *Luz*. Labor unrest continued, despite the government's attempts to control strikes. Madero's democratic administration was failing its staunchest supporters, and rebellions began to surface.

In November the Zapatista faction revolted under the principles of the Plan of Ayala that asked for restoration of village lands to their rightful owners. The armed revolt spread through the states of Morelos, Guerrero, Tlaxcala, Puebla, México, and even into Mexico City. By 1912 the Zapatista forces had caused severe damage to communications (railroad and telegraph lines) and had won battles with the federal troops. Revolutionaries from several areas began to challenge the new government, and an offensive was launched in March 1912 by Pascual Orozco, who accused Madero of abandoning the principles of the Plan of San Luis Potosí. Orozco was defeated, however, by Victoriano Huerta, who was commander of the federal forces. Meanwhile, Felix Díaz

(Porfirio's nephew) was assembling an army in Veracruz to march against Madero, but Madero was able to order his arrest and bring him to Mexico City.

Felix Díaz and other counterrevolutionaries plotted a military coup from inside prison and proceeded to take the National Palace on February 8, 1913. With the aid of loyal troops under Huerta, Madero initially resisted the Díaz forces, but the Decena Trágica (Ten Tragic Days) followed, and street fighting and chaos overtook the city. On February 18 Huerta joined the coup against Madero and had both the president and Vice President José María Pino Suárez arrested.

Huerta's decision to change sides was made with the knowledge and assistance of United States ambassador Henry Lane Wilson in what became known as the Pact of the Embassy. Huerta extracted a resignation from both Madero and Pino Suárez and had himself appointed secretary of the interior, which made him the heir to the presidency, according to the provisions of the constitution of 1857. That same evening Huerta was sworn in as president. Huerta's indignities had not yet ended: on February 21 Madero and Pino Suárez were assassinated while being transferred to the penitentiary in Mexico City.

The Huerta Dictatorship

Huerta was a poor mestizo from Jalisco whose military career as part of the repressive forces during the Porfiriato was uneventful. Huerta's notoriety came in 1911, when he commanded the federal forces ordered to speed up the demobilization of Zapata's troops. Once in power, opposition to Huerta began to emerge. Venustiano Carranza in Coahuila, Pancho Villa in Chihuahua, and Álvaro Obregón in Sonora formed a front against the dictator under the Plan of Guadalupe, issued in March 1913. Zapata preferred to maintain his troops' independence from the northern coalition, which kept the federal forces fighting on two fronts. Huerta's response was to increase the size of the military by forced conscription. The federal forces terrorized the countryside and looted villages, while political assassinations became a trademark of his rule. The federal treasury was empty, and each faction began issuing its own currency. To top it all, Huerta's government had not been recognized by the United States, which considered him a usurper of the previously elected government. The next move by the White House was to channel aid indirectly to the northern coalition and later to resort to military intervention by early 1914.

Huerta was clearly losing on all fronts by early 1914, but one event precipitated his resignation. As a result of a single incident of trespassing on dock facilities by American sailors at Veracruz and their subsequent arrest, the commander of United States naval forces off Tampico demanded ceremonial salutes of the United States flag by Mexican personnel. When the American demands were not met, United States troops occupied Veracruz. Indignation brought about a series of reprisals against United States citizens and their flag throughout Mexico. Huerta resigned on July 8, 1914.

The Constitution of 1917

After the fall of Huerta, Carranza, chief of the northern coalition, invited all Revolutionary leaders to a military conference at Aguascalientes to determine the future course of Mexico. A split developed almost immediately: on one side were Carranza, Obregón, and supporters of the plans of San Luis Potosí and Guadalupe; on the other side were Zapata, Villa, and the supporters of the Plan of Ayala. The convention chose Eulalio Gutiérrez, who had the support of the Villistas and the Zapatistas, as provisional president, while Carranza, with Obregón's support, established a dissident government in Veracruz. The country went through another period of civil war and anarchy in which four governments claimed to represent the will of the people: Carranza in Veracruz, Obregón in Mexico City (after Gutiérrez had left the city and established his headquarters in Nuevo León), Roque González Garza (supported by the Zapatistas), and Villa in (in Guanajuato), and later that year Carranza emerged as the victorious commander of the Revolutionary forces. His government was soon recognized by the United States.
ous commander of the Revolutionary forces. His government was soon recognized by the United States.

United States support for Carranza prompted an aggressive reaction from Villa. After 1916 he frequently raided United States border towns and would then retreat to Mexico. General John J. "Blackjack" Pershing's troops crossed the border in pursuit of Villa several times during 1917. Despite Villa's "victories" over Pershing, the true victor was Carranza. To consolidate his power further and to institutionalize the Revolution, he called for a meeting at Querétaro, where the constitutionalists would draw up a new supreme law for Mexico. The preliminary sessions for the Constituent Congress were held in November 1916. The Congress of Querétaro met for the first time on December 1,

1916. Since then, the inauguration of all Mexican constitutional presidents has taken place on December 1.

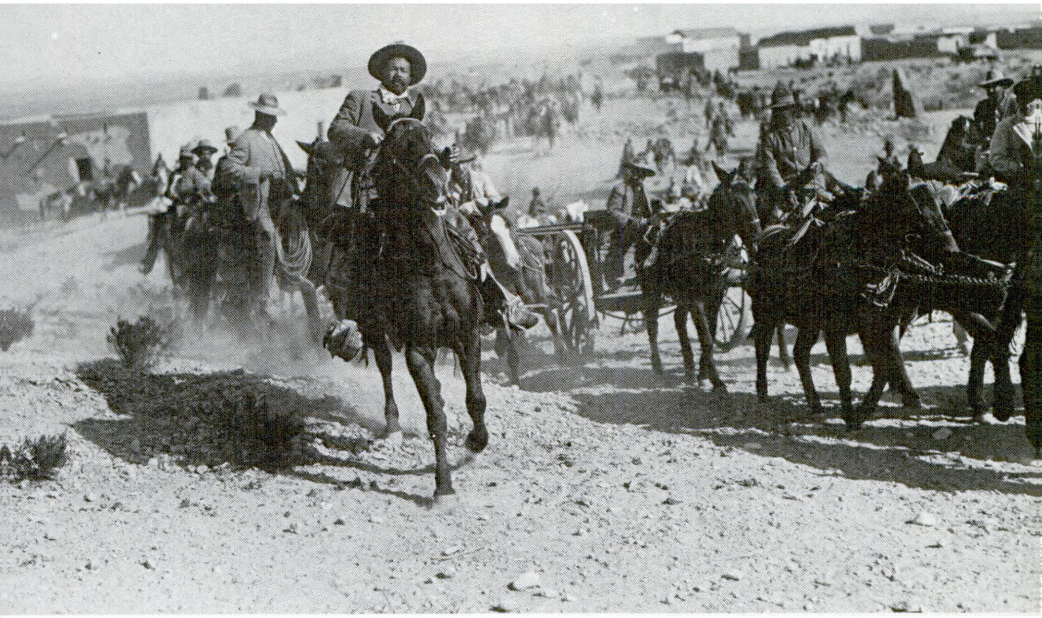
Carranza presented his personal draft of a constitution to Congress. It was similar in many ways to the constitution of 1857, but it gave extensive powers to the executive. Congress split over the issue of Carranza's draft. On one side were the Carrancistas, and on the other were the radicals clamoring for broader social reforms. Leading the radical faction in Congress was Francisco Mujica, who proposed a series of provisions to curtail the power of the church. He would ultimately be instrumental in drafting three important articles of the Constitution: Article 3, which secularized education and at the same time made it free and mandatory; Article 27, which established ownership of the land by Mexicans (not foreigners), restored the Indian lands, and provided for national ownership of all natural resources; and Article 123, which addressed the labor question by establishing eight-hour workdays, six-day work-weeks, equal pay for equal work, and the right to organize and to strike.

The Constitution of 1917, despite Carranza's opposition to its most progressive provisions, was a major advancement for the Mexican people. It was the fruit of the Revolution—an expression of popular will that guaranteed civil liberties and protection against foreign and domestic exploitation (see The Government, ch. 4).

Carranza's Presidency

After formally accepting the Constitution of 1917, Carranza won the presidential election and was sworn into office on May 1, 1917. Conditions in Mexico were close to chaos once again: the economy had deteriorated further during the years of internal war, communications had been seriously disrupted, and shortages had led to rampant inflation. Land and labor remained the basic issues for the Mexican people, but Carranza chose to overlook the constitutional provisions dealing with these issues. Despite the president's apathy, public enthusiasm for the labor provisions of Article 123 led to the organization in 1918 of the Regional Confederation of Mexican Workers (Confederación Regional de Obreros Mexicanos—CROM), which would provide leadership to the labor movement in the years ahead. Meanwhile, Mexico was relieved that the United States was engaged overseas in World War I, its thoughts and its troops distant from any further intervention in Mexico.

The Revolution was still being fought in several parts of the country, but the fighting was particularly fierce in Morelos. The



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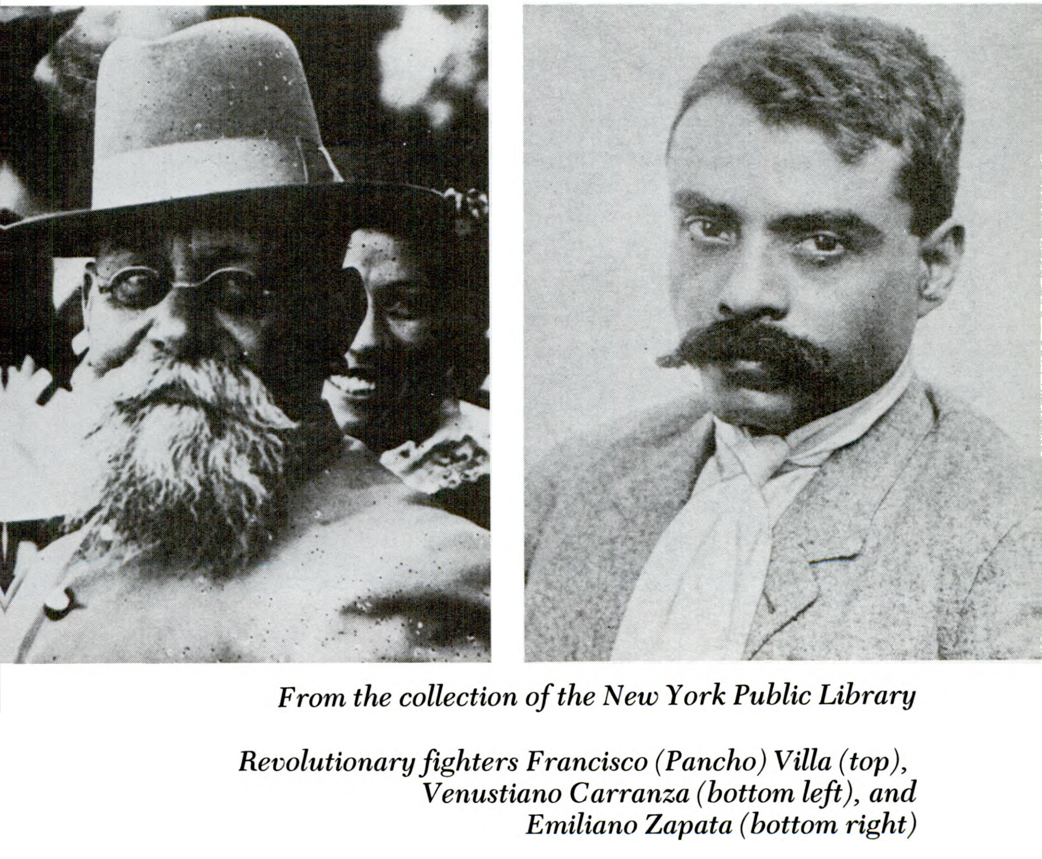

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Revolutionary fighters Francisco (Pancho) Villa (top), Venustiano Carranza (bottom left), and Emiliano Zapata (bottom right)

Zapatistas wanted more than a Magna Charta, for they had very specific grievances and would not accept half-measures or unfulfilled promises. In March 1919 Zapata sent a communication to Carranza in an open letter. According to Zapata, such a letter would make the president aware of the Zapatistas' demands while having the whole population as a witness. Zapata further expected that Carranza, once confronted by his fellow countrymen, would be willing to offer them his help. Carranza's response was very different, however. Jesús M. Guajardo, a colonel in the federal army, was contracted to deceive Zapata by offering allegiance to the revolutionaries. Zapata's cautious acceptance of Guajardo's protests of loyalty led to their setting up a meeting on April 10, 1919, at the Hacienda de Chinameca, in Zapata's territory. As he entered the hacienda, Guajardo's men looked prepared to do him honors by firing a gun salute, but instead they fired point-blank at Zapata. The men involved in the plot against Zapata were honored by Carranza.

In 1920 Carranza was about to announce that his choice for the next presidential nominee was Obregón, when Adolfo de la Huerta and Plutarco Elías Calles rose in opposition. Under the Plan of Agua Prieta, they raised a constitutionalist army of northerners and marched on Mexico City. Carranza fled the capital and was assassinated in May while on the road to exile. Carranza left a legacy of being adamantly against major social changes, a stance that frustrated the expectations of the Mexican people after the constitutional victory of 1917.

Life During the War Years

The decade of 1910–20 made a tremendous impact on the lives of the Mexican people. War ravaged the country, fratricidal battles left children orphaned, and the people were hungry and homeless. Military operations inflicted destruction everywhere, to the point of instilling fear at the approach of any soldiers in the countryside. To the peasants, it did not matter which faction came their way, for all troops destroyed their crops, drafted their young, and violated their women. *Soldaderas* (female soldiers) accompanied their men on the battlefield, many fighting side by side with them. Foreigners everywhere were harassed, with or without justification, as the hatred against them that had grown during the Porfiriato was expressed violently.

The fighting reduced the importance of Mexican regionalism because it promoted migration of people throughout Mexico, either by involving them directly in war operations or by causing them to flee the battles in their homelands. The war became an avenue of social mobility, and people were promoted through the ranks on the basis of merit rather than on traditional nepotism and favoritism. The new Mexican began to be recognized for his heroic conduct in battle and for the defense of popular aspirations. The Revolution was already irreversible; it had reshaped the values of an entire society. In time, the ideals of Madero, Zapata, the Flores Magon brothers, and so many others would take their place within Mexican reality.

The Constructive Phase

The Obregón Presidency

The four years of Obregón's presidency (1920–24) were dedicated to beginning the realization of the objectives of the Constitution of 1917. The military phase of the Revolution was over, and the new administration began to build the bases for the next stage of the Revolutionary process of reconstruction.

The country was still suffering the effects of both a long war at home and the post-World War I recession. International market prices were low for all Mexican products, with the exception of oil, which financed the implementation of the Constitution of 1917.

Obregón's choice for secretary of education was José Vasconcelos, who was dedicated to introducing structural changes into the Mexican educational system, as provided by Article 3 of the Constitution. Vasconcelos adapted the curricula of all schools to Mexican reality by teaching students basic skills in reading, writing, mathematics, history, and geography. He believed in integrating the Indian into Mexican society through education. He also believed in instructing through images, and for that purpose he commissioned works by Mexican muralists that would decorate public buildings while teaching the people about important events in Mexican history and the ideals of the Revolution. Schools and libraries were built by the thousands, and books were printed for distribution to these institutions. Despite the secularization of education prescribed by the Constitution, the government realized that it could not afford to close parochial schools, but to counteract the influence of the church it began to promote Protestant groups (see Education, ch. 2).

Obregón defended labor through CROM, even to the extent of subsidizing its conventions. The government's support of a national union contributed to its growing membership. But Obregón's sympathies for CROM did not extend to other smaller labor unions, such as the communist Federation of the Mexican Proletariat, because of their affiliations with foreign organizations like the Industrial Workers of the World.

Obregón's agrarian policies were not revolutionary at all. He realized that the Mexican economy could not afford to cut productivity with radical agrarian reform. However, by 1924 about 1,215,000 hectares of land had been distributed to nearly 600 Indian communities. Obregón was careful in handling Article 27 of the Constitution, which restricted landownership by foreigners, because of fear of intervention by the United States. Despite this, American oil companies launched a campaign against the Mexican government, fearing a possible implementation of Article 27. A joint Mexican-United States commission agreed to meet at Bucarelli Street in Mexico City from May to August 1923, and under the terms of the commission agreements, known as the Bucarelli Agreements, Mexico would uphold the principle of "positive acts." On the one hand, it implied that if a foreign enterprise did not improve the land (in the case of oil, by placing oil drilling equipment), the company's holdings could be claimed after May 1, 1917. On the other hand, the United States would fulfill its part of the agreement by recognizing the Mexican government in 1923.

The political climate was changing, and there was general dissatisfaction over the Bucarelli Agreements. At about the same time, Villa was ambushed and assassinated after he had expressed an interest in returning to a more activist role in Mexican political life. Responsibility for Villa's death was not established, but people believed at the time that it was politically motivated. When the time came for the next presidential nomination, Obregón's choice fell upon his secretary of interior, Calles. A strong opposition rallied against the nomination, and landowners, clergy, military, and others rose in armed rebellion. However, Obregón's position remained secure because he had the support of CROM, the nationalists, and the United States. In the end, Obregón's government had disappointed the more radical Revolutionary factions, as well as certain interest groups, such as the military, wealthy landowners, and conservative Catholics, but it achieved what it had set out to do: to bring Mexico a certain degree of political stability.

The Cálles Presidency

Calles was born in the state of Sonora in 1877. After working as a local schoolteacher, he became governor of his state and, following his nomination for the presidency by his fellow Revolutionary general, Obregón, won and assumed office in 1924. Calles was a liberal and was perhaps the strongest political force in Mexico since the Díaz dictatorship.

Although administrations had had to fight economic recession, Calles inherited a much more promising situation. He began to implement agrarian reform by distributing some 3.2 million hectares of land during his term, in addition to developing agricultural credit and irrigation. Labor was still the realm of CROM, even though independent unions were also organized. Education was already on a strong footing, and Calles expanded Vasconcelos' program by building another 2,000 schools and placing emphasis on the acculturation of Indians through the learning of Spanish. He created the Department of Public Health and promoted vaccination.

Because of the change in government, United States interests began to worry once again. This exercised enormous pressure on Calles, which he did his best to ignore. In 1925 a new law was enacted to regulate oil concessions in Mexico that required all companies to apply for governmental confirmation of their permits to operate. The appointment of Dwight W. Morrow as United States ambassador to Mexico (1927–30) helped improve the chronically troubled relations between the two neighbors. Morrow personified a change in the behavior of the United States toward Mexico; there was no longer any threat of intervention.

A major crisis developed, however, between the government and the Catholic church. In 1926 the archbishop of Mexico, José Mora y del Río, made public his view that Catholics could not follow religious provisions of the Constitution of 1917. In defiance of the declaration by the archbishop, Calles decided to implement fully several of the constitutional provisions: religious processions were prohibited; the church's educational establishments, convents, and monasteries were closed; foreign priests and nuns were deported; and priests were required to register with the government before being granted permission to perform their religious duties. The church reacted by going on strike on July 31, 1926, and during the three years that followed, no sacraments were administered. A bloody revolt broke out in the states of Michoacán, Puebla, Oaxaca, Zacatecas, Jalisco, and Nayarit. To the call of "Viva Cristo Rey" (Long Live Christ the King), bands of militant Catholics attacked government facilities, killing people and burning schools. The Cristero Rebellion was fought fiercely by government troops; it did not end until 1929.

Calles supported the return of Obregón to the presidency, envisioning that the favor would be returned in six years (the new expanded duration of the presidential term, called a *sexenio*). Obregón won the election but was assassinated on July 17, 1928, by a religious fanatic. Calles stepped in to ensure political stability and chose Emilio Portes Gil as president (December 1928 to February 1930). By 1929 Calles' political machine had been organized as the National Revolutionary Party (Partido Nacional Revolucionario—PNR), and the party candidate was Pascual Ortiz Rubio, who became the Mexican president for two years ending in September 1932. The next in line was Abelardo Rodríguez, who finally completed Obregón's term in 1934.

During this period, which has been called the Maximato (from Calles' title of *jefe máximo*, meaning highest chief), Calles continued to hold the country's political strings through the actions of three presidents who were essentially his puppets. The army was co-opted into the PNR, and the Cristero Rebellion was pacified with the help of Ambassador Morrow and Father John Burke, a United States Catholic leader. The death of Obregón provoked a move to more conservative policies. The government dropped its support of CROM, persecuted the Mexican Communist Party, and allowed fascist organizations to terrorize Jews and Communists alike. Following the long tenure of this caudillo, the country once again was ready for major changes. In 1934 the aspirations of the Mexican people were personified in the next president.

The Cárdenas Presidency

The administration of Lázaro Cárdenas (1934–40) corresponded to the implementation of a social revolution in Mexico, according to the principles of the Constitution of 1917. Cárdenas had participated in the Revolutionary process through the ranks and had excelled as governor of his home state of Michoacán. He had supported Obregón and Calles, and in 1933 he became Calles' candidate for the presidency with the full support of the PNR.

He began his administration by taking some very popular measures—he cut his presidential salary and decided not to move into the presidential palace. He also made a point of meeting with common people, the real Mexicans. Calles started a bitter campaign against the new president after his men were ousted from the government. Calles' open opposition earned him forced exile to the United States in 1936. Conservatives from San Luis Potosí staged a rebellion in protest, but Cárdenas' armed forces brought the incident under control.

Land reform was only one of Cárdenas' major accomplish-

Plutarco Elías Calles
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Lázaro Cárdenas
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ments. In the course of six years, he distributed almost 20 million hectares to two-thirds of the Mexican peasantry through the system of *ejidos* (see Glossary). Even though agriculture suffered an initial setback because of the high rate of land distribution, in the long run it proved to be a positive move, in both social and political terms. The National Campesino Confederation (Confederacion Nacional Campesina—CNC) was also organized during the Cárdenas regime.

Church relations were improved through the intervention of Luis María Martínez, archbishop of Mexico, who encouraged Catholics to be more sensitive to the social and economic welfare of society, even though education continued to be secular and had become socialist in its emphasis. The labor movement also received Cárdenas' attention, and he supported Vicente Lombardo Toledano, a Marxist who organized labor into the Confederation of Mexican Workers (Confederación de Trabajadores

Mexicanos—CTM). The old CROM had become corrupt through the years, and the CTM would become the new, quasi-official representative of Mexican workers, developing programs and pushing for improvement of working conditions and minimum wage schedules (see Labor Groups, ch. 4).

Cárdenas' major accomplishment, however, arose from a strike by oil workers in 1938. The presidential decree of March 18, issued not only in response to workers' grievances but also as a result of the unwillingness of the oil companies to comply with the law, dramatically nationalized the entire oil industry, which included 17 different foreign companies. The Mexican people were delirious, and Cárdenas received support and congratulations from all over Latin America for his nationalistic move against foreign interests. The United States firms that had oil interests in Mexico started a campaign against the "communist danger" presented by Cárdenas' decision. However, matters were settled through an international arbitration commission that fixed the compensation for the expropriated companies. The final agreement for payment of compensation to the oil companies was signed between Mexico and the United States on November 19, 1941, as a part of United States efforts to normalize relations in the face of World War II. A national oil company called the Mexican Petroleum Company (Petróleos Mexicanos—PEMEX; not to be confused with the United States-owned Mexican Petroleum Company) was created, but it was burdened with difficulties in its early years.

The daring Mexican president also made structural changes in the official Mexican party, the PNR, to strengthen its political base. He created the Party of the Mexican Revolution (Partido de la Revolución Mexicana—PRM), which included representatives of the four major sectors of Mexican society: the labor, agrarian, military, and popular. Cárdenas' socioeconomic changes provoked some economic difficulties at home, characterized by the exodus of Mexican and foreign investment capital that feared the coming of a procommunist state (see Institutional Revolutionary Party, ch. 4).

Economic growth declined between 1938 and 1940 because of the expenses incurred by Cárdenas' social reforms and the slowing of the oil industry. But the accomplishments of his years in government could not be overshadowed: land was given to the people, the labor movement had been reorganized and moralized against corruption, nationalism had received a tremendous push with the expropriation of the oil companies and the creation of PEMEX, and the political base of the party had been broadened into the PRM. These were very positive signs of the times by which Cárdenas proved that it was possible to carry on the basic principles of the Revolution with peace and overall growth. He realized that a new era was beginning and that Mexico would establish its own pace of development. The expropriation of the oil companies marked the end of the leftist revolution in Mexico. It prompted domestic and foreign investors to shy away from Mexico. Even the new national oil enterprise, PEMEX, had to overcome technical difficulties, e.g., lack of spare parts, and the decline of oil revenues. Inflation set in, pushing food prices up 50 percent between 1935 and 1940. After 1938 the land redistribution program slowed down. All these signs were perceived by Cárdenas as a call for changes in the course of the Revolution in Mexico. His choice of Manuel Ávila Camacho for the presidency demonstrated Cárdenas' deepest understanding of the country's evolution into a new phase of political and social stability and slow economic recovery.

Life in Mexico, 1920–40

Growth and change were the results of political stability achieved in 20 years of Mexican Revolutionary history. The country was becoming further integrated as a result of the advent of roads, buses, and automobiles. Electricity was reaching the smallest towns in the countryside. The movie industry and the radio popularized culture. Educational broadcasts and films presented the achievements of the Revolution and popular folk themes.

The schools—rural schools in particular—had replaced the church as centers of community activities. Medical care was now available to a larger number of people, and the overall quality of life had improved. Debt peonage had been greatly reduced, and more small farmers were free to come and go. The *ejido* had its own voice and was brought to participate in the national government through its representatives in the PRM.

Educational achievements also took a more informal course. Works were commissioned by Mexican artists, such as Diego Rivera, José Clemente Orozco, David Álfaro Siqueiros, Rufino Tamayo, and many others. Their murals took history to the streets in the decoration of public buildings with popular themes illustrating the Indian heritage and the Revolution. The period was very important for its cultural evaluation of the Indian past and for its conscious effort to integrate Indian Mexico into Mexican society. Mexicanidad ("Mexicanness") and its expressions in contemporary society were concepts developed during the period. Mexican society, led by the intellectuals after 1915, was turning its back on foreign models and looking for a national cultural identity. The nativistic movement permeated music and the arts and had a lasting impact on Mexican society that has continued to this day.

Revolution to Evolution

The Post-Cárdenas Period, 1940–58

Ávila Camacho's Administration

Cárdenas' nomination of Ávila Camacho as the PRM candidate for the presidency surprised many Mexicans, for both Cárdenas and the party were perfectly aware of his conservative tendencies. However, because the already sluggish Mexican economy was being threatened further by World War II, the choice of a compromise candidate was called for. During the presidential campaign, Ávila Camacho stated that he was a believer and a Catholic.

The new president took office on December 1, 1940, and, as expected, did not push for enforcement of the most progressive articles of the Constitution. Land reform was slowed down, and the emphasis shifted from *ejidos* to private ownership of land.

Fidel Velásquez, a more conservative labor leader, replaced Lombardo Toledano as head of the CTM. The government did not give its full support to organized labor, and more controls were placed on the rights of strikers. By 1942 the CTM had lost textile and building industry workers who were disgusted with the new labor leadership. One innovation of Ávila Camacho was the creation of the Mexican Social Security Institute (Instituto Mexicano del Seguro Social—IMSS), but the coverage it provided was very small and only applied to a small portion of the Mexican working population.

The conservative administration showed some innovative approaches to education. Greater emphasis was placed on private schools, and the government started a campaign that encouraged each literate citizen to teach another person to read and write. The impact of the campaign was small and short-lived, however.

Ávila Camacho's administration was disrupted by the outbreak of war in Europe, but Mexico was initially willing to maintain a neutral policy toward all countries involved. However, Mexican ships were sunk off its coasts, and Mexico declared war on the Axis powers in 1942. The declaration received full support from the previous presidents, who congregated on September 16, 1942, at the National Palace for a public display of solidarity in the face of war. Those present included former presidents de la Huerta, Calles, Portes Gil, Ortiz Rubio, Rodríguez, and Cárdenas. A tighter national security policy was developed against espionage and in defense of Mexican oil fields and military industries. Mexico participated with the Allies in the war effort, and Mexicans fought in the Pacific theater. In addition, Mexico supplied the Allied forces with important raw materials, such as metals and fibers, for the American war industry (see Background and Traditions of the Armed Forces, ch. 5).

In 1942 Ávila Camacho and United States president Franklin D. Roosevelt were responsible for starting a program that enlisted *braceros* (migrant Mexican workers), who entered the United States to supplement the depleted rural labor force displaced by the war effort. Memories of the *bracero* program subsequently lured Mexican laborers to seek employment, both with and without legal documentation, across the border.

The war had a positive effect on the Mexican economy in that Mexico was forced to manufacture products that previously had been bought from the industrialized countries. The push was not only for import substitution but also for exporting Mexican products to Latin American markets. Ávila Camacho created a national finance agency called the National Development Bank (Nacional Financiera—NAFINSA), to be in charge of organizing and providing credit for the growing industrial sector. Domestic capital was invested in industrial ventures, and by 1944 foreign capital was also welcomed for investment in the ownership of up to 49 percent of stock in any venture in Mexico. Industrialization brought new wealth to the country and provided jobs and goods for the growing middle class, but it did little to improve the lot of the working class (see Growth and Structure of the Economy, ch. 3).

By early 1946 the PRM's political power base included new groups participating in the Mexican development process. The party now encompassed representatives of the business and industrial communities and the technocrats within its popular sector. As a sign of these new directions taken by the party that viewed itself as the spokesman for the Mexican Revolution, officials decided to change their party's name to the Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI). The same January 1946 convention appointed the civilian Miguel Alemán Valdés the PRI candidate for the presidential term of 1946–52.

Institutionalization of the Revolution

Alemán was a lawyer from the state of Veracruz who had been secretary of government. As the choice of the official party, Alemán was certain of victory in the 1946 elections. His first official act was to reaffirm the friendly relations between Mexico and the United States. As further assurance of that, United States president Harry S Truman and President Alemán exchanged visits to each other's countries. On September 2, 1947, Mexico was among the signatories of the Inter-American Treaty of Reciprocal Assistance (Rio Treaty), which outlined a system of mutual defense against outside aggression by the nations of the Western Hemisphere (see Mexico as a Security Concern for the United States, ch. 5).

The era of the generals in Mexican politics was over, and Alemán reduced the military budget to 7 percent of government expenditures by 1952. He pursued his predecessor's anti-illiteracy campaign, but school attendance remained low. Another achievement in education was the construction of a new campus—in what was then suburban Mexico City—for the National Autonomous University of Mexico (Universidad Nacional Autónoma de México—UNAM), which was dedicated in 1952. Other construction programs included several flood-control projects, irrigation systems, and hydroelectric stations. Alemán further developed the country's highway system and left Mexico with four times as many kilometers of paved roads (roughly 16,000 kilometers) as were available in 1946.

The booming postwar economy kept pace with the growth of the upper and middle classes, and investment capital was directed to industrial development throughout Mexico. PEMEX expanded pipelines and refineries and intensified drilling operations, but when Mexican oil workers went on strike in 1950, army troops were used to keep the oil fields under control.

Even though the Alemán administration was successful in terms of economic development, corruption was also rampant; millionaires were thus made overnight. To restore popular faith in Revolutionary principles, the PRI was well aware that the next presidential candidate had to be a man above suspicion. The PRI's nomination for the next *sexenio* fell upon Adolfo Ruiz Cortines..

Ruiz Cortines was born into a poor family in Veracruz in 1890 and had been groomed by the political ideas of the Revolution under Madero and Carranza. In 1937 he was elected to the Chamber of Deputies and later on had held the governorship of his home state. Like other Mexican presidents, he had been secretary of government and was a personal friend of his predecessor. Despite his friendship with Alemán, he set out to eliminate the corruption and graft that had characterized the previous administration. In his inaugural speech on December 1, 1952, he promised to require complete honesty from officials in his administration and asked that they make public their financial assets. He later fired several officials on charges of corruption. Another breakthrough in his administration was the enfranchisement of women.

The economy continued to grow with government support. One important measure to attract foreign capital was the devaluation of the peso, which helped to stabilize the economy and to encourage investors from abroad. Ruiz Cortines did not promote a new construction boom; rather, he seemed happy to finish the work begun by Alemán. The IMSS, under the directorship of Antonio Ortiz Mena, was expanded to provide medical services at hospitals and clinics all over the country, in addition to a more comprehensive system of benefits for the population.

One problem facing Ruiz Cortines was a population explosion that had seen the number of Mexicans double in only 20 years. People kept migrating to the urban areas in hopes of finding better opportunities in the growing economy, only to be swallowed up in a growing community of urban poor. To minimize the problem, Ruiz Cortines encouraged the use of large numbers of laborers, instead of machinery, in new industries. Undoubtedly his intentions and actions reflected his belief that, once corruption was successfully tackled, things could improve over time if there were a minimum of government intervention. Meanwhile, the poor became poorer, although economic indicators showed economic growth.

The political machine of the PRI had been a major factor in the institutionalization of the Revolution, and nomination by the party became a sure path to victory in any election. The country was ready for a change by 1958. The election of Ruiz Cortines' secretary of labor, Adolfo López Mateos, was accompanied by promises of a necessary renewal of the Revolutionary process.

The Interregnum: Return to Revolutionary Policies, 1958–64

López Mateos was born in 1910 and was raised in Mexico City. He became a history and literature teacher in nearby Toluca while studying nights toward a law degree and in 1929 became a politician there, joining the PRI (PRN at the time). He participated in Alemán's campaign and was appointed ambassador to Costa Rica; he also was secretary of labor during the Ruiz Cortines administration and won wide support as a labor mediator.

López Mateos was inaugurated on December 1, 1958. During his administration there was a rebirth of leftist agitation as a result of the 1959 Cuban Revolution and of internal pressures in Mexican society. Opposition came particularly from Siqueiros, one of Mexico's renowned muralists, who was also the head of the Mexican Communist Party, and from former president Cárdenas, who sought rapid improvements in conditions for the peasants. Cárdenas founded the Independent Peasant Central Committee to oppose the government's general organization. Siqueiros was sent to jail, and Cárdenas was made a member of an advisory council of former presidents that became quite influential in the administration. López Mateos embodied the vindication of the hopes of postwar Mexicans who were tired of the slow pace taken by the Revolutionary process after Cárdenas' administration. López Mateos was determined to revive the Revolution in the countryside. His administration distributed more than 12 million hectares of land to *ejidos* and to individual peasants and brought lands under cultivation in southern Mexico.

In 1960 the government began to nationalize foreign utility concessions (as opposed to expropriating them, as when Cárdenas expropriated the oil companies in 1938). Some of the larger companies bought included Impulsora de Empresas Eléctricas (from the American and Foreign Power Company of the United States), Mexican Light and Power Company (from a Belgian firm), and Industrial Eléctrica Mexicana (from the United States-based California Power Company). The film industry (previously owned by United States firms) was also brought under Mexican control. The government embarked on social welfare programs for the sick and the aging, and it extended social security benefits into the rural areas. The economy remained strong, as indicated by capital invested in energy, a rapid growth of exports, and additional foreign exchange generated through the tourist industry, which grew rapidly as many new hotels and resort facilities were opened. The demographic explosion in the country and the internal migrations to the major urban areas created a series of problems in terms of health, housing, and employment. Public health campaigns were developed to control malaria, polio, and tuberculosis.

Numerous public demonstrations and strikes broke out between 1959 and 1962. Riots occurred in Mexico City on March 25, 1959, when a nationwide railroad strike was called and workers walked out in support of a 16-percent pay increase. Alleged involvement of Soviet embassy officials in negotiations with strike leader Demetrio Vallejo Martínez, secretary general of the railroad workers union, led to the arrest of Vallejo and the repatriation of the Soviet officials by the end of March, when federal troops were used to put down the strike. On December 6 some 3,000 Mexican army troops occupied San Luis Potosí to prevent election disorders after a strike on December 2 closed schools, factories, and transportation in the city. On August 9, 1960, leftist students rioted in Mexico City against the ousting of leftist leaders from the city's teachers' union. Police intervention resulted in the arrest of 43 people; 21 others were injured. Siqueiros was arrested in connection with the riots. On December 30, 1960, troops fired on 2,000 demonstrators in Chilpancingo, resulting in 13 deaths and the wounding of 37 people. The demonstration rallied against the governor of the state of Guerrero and alleged corruption in government. Two hundred and twenty-four persons were arrested on September 10, 1961, in connection with strikes planned for September 15 in Mexico City; on September 15 some 200 civilians armed with machetes and pistols attacked the military barracks at Jatilpán in the state of Veracruz, leaving one civilian and one soldier dead.

Despite labor unrest and demonstrations against the government on labor issues, López Mateos revived a provision of the Constitution of 1917 that called for profit sharing between labor and management. In 1962 the National Commission for the Implementation of Profit Sharing was organized, and by 1964 organized labor was starting to receive between 5 and 10 percent of company profits.

The administration's educational policy returned to an emphasis on rural education. The government provided building materials and assistance to each village to build its own school; teachers and textbooks were also provided by the federal government, whose educational budget grew to be twice the size of its expenditures for national defense (see Education, ch. 2).

During the López Mateos administration there were several important developments in Latin America. Fulgencio Batista was overthrown, and Fidel Castro Ruz came to power in Cuba in 1959. López Mateos opted for a policy of nonintervention, based on national sovereignty of states, in response to the Cuban Revolution. Mexico voted against the decision to expel Cuba from the Organization of American States and did not abide by any economic retaliation against Castro's regime. Mexico remained the only country in Latin America to maintain diplomatic relations with Cuba. During the Cuban missile crisis in 1962, however, Mexico protested against Soviet intervention in the hemisphere. In relations with the United States, the Chamizal boundary dispute (which arose because of the changing course of the Rio

Grande river bed between El Paso and Ciudad Juárez) was resolved in 1963. The United States agreed to return the boundary to its pre-1864 line, to reimburse El Paso for its loss of territory, and to join Mexico in building a new bridge and a permanent channel so that future disputes would be avoided.

López Mateos introduced changes in the electoral procedure for the Chamber of Deputies through a constitutional amendment. Subsequently, any party with 2.4 percent of the national vote was awarded five seats in the Chamber of Deputies, even if none of the party's candidates won in the elections. Each additional 0.5 percent of the vote would give the party one further seat, up to a maximum of 20 seats. These new representatives, however, would occupy a new seat rather than replace any other congressman. This liberalization policy, although providing a broader representation of the opposition parties, did not change the basic PRI domination of political affairs in Mexico (see The Rules of Political Competition, ch. 4).

López Mateos was the most popular president since Cárdenas. He emphasized an independent foreign policy and political compromise at home. Opposition parties were allowed greater participation in the political process, organized labor was given a share of business profits under the profit-sharing law of 1964, and López Mateos freed Siqueiros in response to popular demand. However, he was not afraid to enforce unpopular measures, as when federal troops were ordered to suppress a railroad strike in 1959, for he believed that a strike by the workers would hamper the country's economy. López Mateos suffered a major stroke soon after leaving the presidency in 1964; he died six years later.

Mexican Development, 1964–82

The Díaz Ordaz Administration

Gustavo Díaz Ordaz was born in 1909 in Puebla. He was a lawyer and later became a university professor at a Catholic law school in Puebla. Díaz Ordaz entered politics as a representative in the Chamber of Deputies and later was elected to the Senate. He served in cabinet posts during the administrations of Ruiz Cortines and López Mateos. In 1963 he resigned his position as secretary of government to run for the presidency; he was elected on July 5, 1964. The congressional elections, which produced some modifications in the composition of the Chamber of Deputies, showed the results of López Mateos' innovations in electoral procedures: out of 210 representatives elected, 175 seats belonged to the PRI, 20 to the Party of National Action (Partido de

Acción Nacional—PAN), 10 seats to the Popular Socialist Party (Partido Popular Socialista—PPS), and five seats to the Authentic Party of the Mexican Revolution (Partido Auténtico de la Revolución Mexicana—PARM). All 60 candidates elected to the Senate were from the PRI (see Opposition Parties, ch. 4).

Díaz Ordaz was inaugurated on December 1, 1964. His nomination had not been well received by the liberal wing of the PRI. In his previous position under López Mateos, Díaz Ordaz had been responsible for some very controversial policy decisions, including the arrest of Siqueiros and the annulment of local elections in Baja California when PAN received a majority of the votes.

Business interests received priority during this period. Students and labor were kept under control so as not to disrupt economic growth. Opposition to the government reached unprecedented proportions, however, in the demonstrations of the summer of 1968, just prior to the Olympic Games that were held in Mexico City in October. From July through October, academic life in the city and throughout Mexico was halted as students rioted in response to a worldwide wave of student protests in Europe, the United States, and Latin America. The antigovernment demonstrations were ignited by student grievances, but many discontented sectors of society joined them.

The PRI and Díaz Ordaz were preparing the country to show foreign visitors that Mexico was politically stable and economically sound. Meanwhile, in July 1968 students at two Mexico City schools started a fight, and the police were called in to break it up. Instead of the police, an antiriot force called the *granaderos* was dispatched and only added to the violence before dispersing the crowd. On July 26 leftist students celebrated the anniversary of the Cuban Revolution, and once again the *granaderos* were present. The street confrontations lasted several days, culminating on July 30, when some students took refuge inside a school, and the *granaderos* blew the door open. The entire academic community reacted strongly against the unnecessary violence; students held massive antigovernment demonstrations at UNAM and the National Polytechnic Institute.

Student demands included freedom for all political prisoners, dismissal of the police chief, disbanding of the *granaderos*, guarantee of university autonomy, and the repeal of the "law of social dissolution" (regulating the punishment of acts of subversion, treason, and disorder). Luis Echeverría Álvarez, the secretary of government, agreed to discuss the issues with the students but changed his mind when they demanded that the meeting be televised. Another demonstration was called for on August 27, and it too met with harsh repression. On September 18 the army invaded the university campus and arrested hundreds of people; but the most tragic event of that year took place on October 2. On that date a peaceful demonstration was scheduled at the Plaza of the Three Cultures in Mexico City's Tlatelolco district. At 6:30 P.M. armed military units and tanks arrived on the scene; when the order to disband was not obeyed, force was used. Shots were fired, and before anyone knew what had happened, thousands were wounded. Estimates of the number of dead ranged from several dozen to many hundreds. The student uprising was crushed, and the Olympic Games proceeded on schedule.

Despite the tragic events at Tlatelolco, the economy grew during the latter part of the 1960s, partly as a result of the Olympics-induced tourist industry boom and partly as a result of several development loans secured through the World Bank (see Glossary). Land reform policies did not differ from those of López Mateos.

The Echeverría Administration

Opposition to the PRI and to the Díaz Ordaz administration voiced by students, intellectuals, and labor unions had culminated in the tragic confrontation at Tlatelolco. Their discontent and frustration over the country's political direction since the 1940s had been met by force. The elections of 1970 and the inauguration of a new administration left little room for hope of any significant changes. The PRI nominee was Echeverría, Díaz Ordaz' secretary of government, who at the time was held responsible for the deaths at Tlatelolco.

The new president inaugurated on December 1, 1970, was born and raised in Mexico City, where he received a law degree, taught at UNAM, and started his political career with the PRI in 1946. In 1957 he directed the López Mateos campaign and subsequently served in his administration. As secretary of government under Díaz Ordaz, he was responsible for internal security.

During the campaign Echeverría traveled throughout Mexico. He visited all 29 states and two territories, in addition to the Federal District, and he seemed to find genuine pleasure in talking to the people and listening to their complaints. He seemed to understand that Mexico had to find ways to distribute more equitably wealth, resources, and opportunities to all Mexicans. Once in office, he recognized the need for rapid and far-reaching economic reforms by continuing to defend economic expansion side by side with redistribution of wealth. The post-World War II boom that had promoted economic development in

Latin America had ended, and a more direct approach to solving the problems of education, health, housing, wages, and job opportunities was needed. However, private sector dissatisfaction with Echeverría's economic policies and rampant corruption in the administration resulted in diminished investments in the agricultural sector and the loss of business confidence in the government's ability to manage the economy.

The agricultural sector was the chief target of the new administration's policies. In any effort to redistribute wealth to the countryside, the depressed agricultural prices paid to farmers had to be taken into consideration. From 1970 on, the government established guidelines for increasing prices of agricultural products to compensate for inflation. The situation was so critical that many farmers had stopped producing, forcing the country to rely on imports of foodstuffs. Another improvement came through the establishment of a government project to direct investments to the countryside in an effort to rectify the previous bias in favor of money flows into the urban areas. Technical assistance was channeled to help private landowners and *ejidatarios* increase production through the use of better seeds, fertilizers, insecticides, irrigation, and machinery. In addition to providing credit for the projects, the government developed a strategy to promote collectivization. Another innovation introduced in 1974 was a 10-percent surcharge on luxury items and a 15-percent tax on entertainment and restaurant bills.

In rural education, the administration placed emphasis on technical training in agriculture and fishing. Rural clinics were expanded to provide health care, and the social security system was expanded in order to distribute benefits to the rural population. This had been tried before, but Echeverría's policies showed his commitment to improving conditions. The new government promoted a technical approach to deal with increased poverty and marginal existence of large segments of Mexican society without hindering economic growth. The businessmen were enraged by the government's social and economic programs, and Echeverría had to reassure them continually of his firm belief in a mixed economy with a steady flow of private investments for continued growth.

The population explosion was finally officially recognized by 1973, and Mexico promised to participate in family planning through education and health programs. In 1975 the government took a further step by granting equal rights to women under the Constitution. It was a change of attitude that showed a certain degree of government awareness toward women's participation in modern Mexican society and their important input in understanding the need for curbing excessive population growth.

Growing civil unrest continued to mark the Echeverría administration. Opposition arose from the entire academic community. Students went on strike in Monterrey against an unpopular, newly appointed university rector in 1971. Echeverría sided with the students, and the rector resigned. However, another tragic event on June 10 of that year, now known as the Corpus Christi Day Massacre, took place when thousands of students held an antigovernment demonstration at the National Polytechnic Institute. The demonstrators were attacked by a right-wing youth group called the Hawks (Halcones), who carried automatic weapons, while the police offered no protection to the students being assaulted. In the end, 11 students were killed and 160 were wounded. Mexico City mayor Alfonso Martínez Domínguez and police chief Rogelio Flores Curiel resigned immediately, and these resignations were followed by those of other city officials. The results of the investigation showed that the students had been attacked by the Hawks and that the attitude of the police was a result of express orders given not to stop or to intervene in the demonstration.

At the end of 1971 Mexicans witnessed an upturn in rural and urban violence, including bank robberies and political kidnappings. Among the kidnap victims were a university rector, government officials, the daughter of the Belgian ambassador, a United States consular official named Terrance Leonhardy, and in the summer of 1974, Echeverría's father-in-law, Guadalupe Zuño Hernández. At about the same time a large weapons cache was found in Veracruz, and ownership was claimed by the terrorist group known as the Twenty-Third of September Communist League. In the state of Guerrero, guerrilla leader Lucio Cabañas kept police forces busy in pursuit of his small guerrilla army, until about 10,000 federal troops were sent to Guerrero and killed Cabañas and several of his men.

Despite or because of all of these factors, Echeverría tried to increase student participation in Mexican political life by lowering the voting age to 18 and by lowering the age for election to the Senate to 30 and for election to the Chamber of Deputies to 21. He freed most of the students arrested after the Tlatelolco Massacre and in 1974 gave asylum to Hortensia Allende, widow of the slain Chilean president. These liberalization overtures were not sufficient, however; the generation that was rebelling in the 1970s had been brought up with Revolutionary slogans and promises. They looked back to the 1920s and 1940s, when changes were being implemented in the name of the Revolution, but they could

Plaza of the Three Cultures, Mexico City
Photo by Arturo Salinas

not find these same ideals alive in the 1970s. They saw corruption, injustice, discrimination, favoritism, paternalism, and disregard for the law as part of their everyday lives, and they hoped for something new and different. The country was experiencing a deficit in its balance of payments, and in 1976 the peso was devalued twice in two months. These problems were compounded by the perennial problem of uncontrolled population growth.

During the Echeverría administration, Mexico acquired control over more industrial concerns. Anaconda Mining Company released 51 percent of its stock in Mexican mining operations to Mexican investors. The Mexican government acquired several television stations and nationalized the entire tobacco industry. The government also purchased 51 percent of the stock in the telephone company, Teléfonos de México, and took over a private bank, the Banco Internacional. At the very end of his term, Echeverría legalized ownership of occupied lands in the Yaqui Valley of Sonora after landless peasants invaded and occupied the area. This political dispute culminated in the resignation of Sonora's governor and exacerbated further the strained relations between Echeverría and the Monterrey Group of private sector interests.

Once more, a president's sporadic liberal measures did not gain him popular support, and basic problems remained untouched. Echeverría's successor inherited a country plagued by old problems, tired of old promises, and searching for new ideologies that corresponded with people's aspirations.

The López Portillo Administration

President José López Portillo y Pacheco was inaugurated on December 1, 1976, amid a political and economic crisis inherited from the previous administration. A rising foreign debt and inflation rate, a recent 55-percent currency devaluation (the first since 1954), and a general climate of economic uncertainty that had spurred the flight of capital plagued the economy. He was also faced with the political consequences of the Sonora land seizures and a general lack of confidence in government institutions. Unexpected help arrived as a result of the confirmation of large oil reserves discovered in the states of Tabasco and Chiapas; and in the Bahía de Campeche just prior to his inauguration. The Mexican government chose to follow a policy of increasing oil production only gradually in order to prevent an inflationary spiral that would disrupt economic recovery. By 1981, nevertheless, Mexico had become the fourth largest producer of oil in the world, its production having tripled between 1976 and 1982. While production increased, so did the price per barrel of crude oil. The economic wealth generated by oil during the administration of López Portillo gave Mexico a greater degree of confidence in international affairs, particularly in its ever important relations with its northern neighbor. The government, for example, refused to accept the United States boycott of the Olympic Games in Moscow. More important, when the two countries could not agree on the price of natural gas, Mexico flared its excess resources rather than sell to the United States below its asking price. Also in defiance of United States wishes, Mexico recognized the rebels in El Salvador as a representative political force. Mexico's renewed self-confidence was apparent in its taking these steps even though the United States remained Mexico's major oil customer and its major source of investment capital (see Petroleum, ch. 3; Foreign Relations, ch. 4).

The food industry received considerable attention in 1980 during the beginning of the oil bonanza. The government feared that the country's new wealth would be spent on imports of foodstuffs, and to curtail this trend it created an agency called the Mexican Food System in March 1980 to encourage increases in domestic food production toward self-sufficiency. The funds initially generated by the oil boom were generally beneficial for the industrial complex.

Oil did not solve all of Mexico's problems, however. The oil industry grew rapidly but could not absorb the ever growing unemployed labor force. Oil made Mexico a rich nation in which a majority of the people continued to live in poverty. Foreign banks and the international lending agencies, seeing Mexico as a secure investment owing to its abundant energy resources, flooded the country with loans that kept the peso overvalued. By the end of López Portillo's administration, another economic crisis was brewing, which was exacerbated by a glut in the international oil market that led to oil price reductions. As a result, Mexico found it increasingly difficult to meet its foreign debt payments. A new inflationary trend led to capital flight and loss of confidence in the nation's economy. López Portillo's response was to establish currency controls and to nationalize all private banks. By 1982 Mexico was one of the leading debtor nations in the world, and on February 17, 1982, the peso was allowed to float and suffered a devaluation from about 26 to 36 pesos to the United States dollar; on August 6 the peso dropped to 84 per dollar; and in December another devaluation saw the peso plunge to 100 pesos to the dollar (see External Debt, ch. 3).

The structural problems that had traditionally plagued Mexico—destitution, lack of jobs, exploitation by employers, high-level corruption, and the attraction for Mexicans of a better life in the United States—created problems between the two countries. The migration of Mexican workers—both legal and illegal—to the United States had grown fairly steadily since the 1964 termination of the *bracero* program. It was increasingly a subject of domestic United States politics, involving United States immigration laws, organized labor interests, and the growing Latin American population in the United States. By the early 1980s the government of Mexico, for its part, had become increasingly concerned with the basic human rights of its citizens in the United States.

All the unresolved problems, such as the foreign debt, the high inflation rate, the sudden nationalization of private banks, the lack of confidence of banks and investors, Mexico's stance on the internal conflicts in Central America, and the problems of Mexican undocumented workers in the United States, were inherited by the next administration. The PRI nominee for the presidency in 1982 was Miguel de la Madrid Hurtado. Born in 1934 in Colima, he was a lawyer who held a degree from Harvard University and who, like his two most recent predecessors, had never before held an elected office. President de la Madrid was inaugurated on December 1, 1982 (see Money and Banking, ch. 3; Latin American Relations, ch. 4).

* * *

There is an enormous wealth of historical literature on Mexico, and both Mexican and foreign historians have produced analyses of the developments leading to the country's position in contemporary Latin America. The most useful standard histories of Mexico are Henry Bamford Parkes' *A History of Mexico*, Charles C. Cumberland's *Mexico: The Struggle for Modernity*, Frank Tannenbaum's *Mexico: The Struggle for Peace and Bread, and* Jan Bazant's *A Concise History of Mexico*. The most recent, complete, and best researched general historical analysis available in English in 1984 is Michael C. Meyer and William L. Sherman's *The Course of Mexican History*, a comprehensive book that presents Mexican history from pre-Conquest times to the inauguration of President de la Madrid in 1982.

For the study of pre-Columbian peoples and their origins, Eric R. Wolf's *Sons of the Shaking Earth* and Michael D. Coe's *Mexico* are extremely useful. The Aztec traditions and belief system are also well researched and artfully presented in José López Portillo's *Quetzalcoatl*. The classic work of Bernal Díaz del Castillo, *The Discovery and Conquest of Mexico, 1517–1521*, remains one of the best sources of information about the arrival of the Spaniards in Mexico and the victory over the Aztecs.

For the colonial period, Clarence Henry Haring's *The Spanish Empire in America*, Charles Gibson's *Spain in America*, François Chevalier's *Land and Society in Colonial Mexico;* William B. Taylor's *Landlord and Peasant in Colonial Oaxaca*, and James Lockhart and Stuart B. Schwartz' *Early Latin America: A History of Colonial Spanish America and Brazil* were the most useful for the purposes of this chapter. The struggle for independence and the Mexican Revolution are the most well researched subjects. Aside from the general works already cited, there are W. Dirk Raat's *Mexico: From Independence to Revolution, 1810–1910*, Victor Alba's *The Mexicans: The Making of a Nation*, Jesús Romero Flores' *La Revolución Mexicana (anales históricas, 1910–1974*, John Womack's classic *Zapata and the Mexican Revolution*, and many more.

For the modern period, the following sources are helpful:

Thomas G. Sanders' *Mexico in the 70s;* Howard S. Cline's *Mexico: Revolution to Evolution, 1940–1960;* Fernando Benítez' *Lázaro Cárdenas y la Revolución Mexicana* (three volumes); Frank R. Brandenburg's *The Making of Modern Mexico;* Jaime Castrejón Díez' *La República Imperial en los 80's;* Kenneth F. Johnson's *Mexican Democracy;* Dan Hofstadter's *Mexico, 1946–73;* and the articles published in the *Mexican Forum*. (For further information and complete citations, see Bibliography.)

Chapter 2. The Society and Its Environment

A representation of a Mexican mother and children, from a painting by David Álfaro Siqueiros

MEXICAN SOCIETY OF THE EARLY 1980s was characterized by pronounced regional and socioeconomic diversity. The country's principal regions included the relatively prosperous and highly industrialized areas around Mexico City, the industrialized areas in the northeast, the rich agricultural-export areas of the northwest, and the impoverished areas of the south and southeast. The economic bonanza generated by the discovery of rich oil fields during the 1970s was soon tempered by the August 1982 financial and economic crisis, the worst in Mexico's history. Standards of living severely deteriorated, and the federal government was led to enforce strict austerity measures.

Mexico was a predominantly mestizo society, the product of more than four centuries of acculturation and miscegenation among the nation's diverse ethnic groups. Social class as an indicator of status, prestige, and power was more relevant than membership in a particular ethnic group. Social mobility, albeit difficult, was possible and was encouraged. The government was the nation's most important investor and employer. Since the 1930s a single political party, the Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI) has been a major source of power within the government and an important source of social mobility in the society. As a result of the Revolution, public sector decisionmaking has tended to be autonomous from the private sector. Moreover, political elites and economic elites have rarely coincided.

Interpersonal relations within the extended family and diverse kinds of friendships continued to be the most important element in understanding the functioning of Mexican society. The cornerstone was the family. Other important elements continued to be the role that the official governing political party played nationwide as sponsor of a system of political co-optation and the important role that religion played in this predominantly Roman Catholic nation.

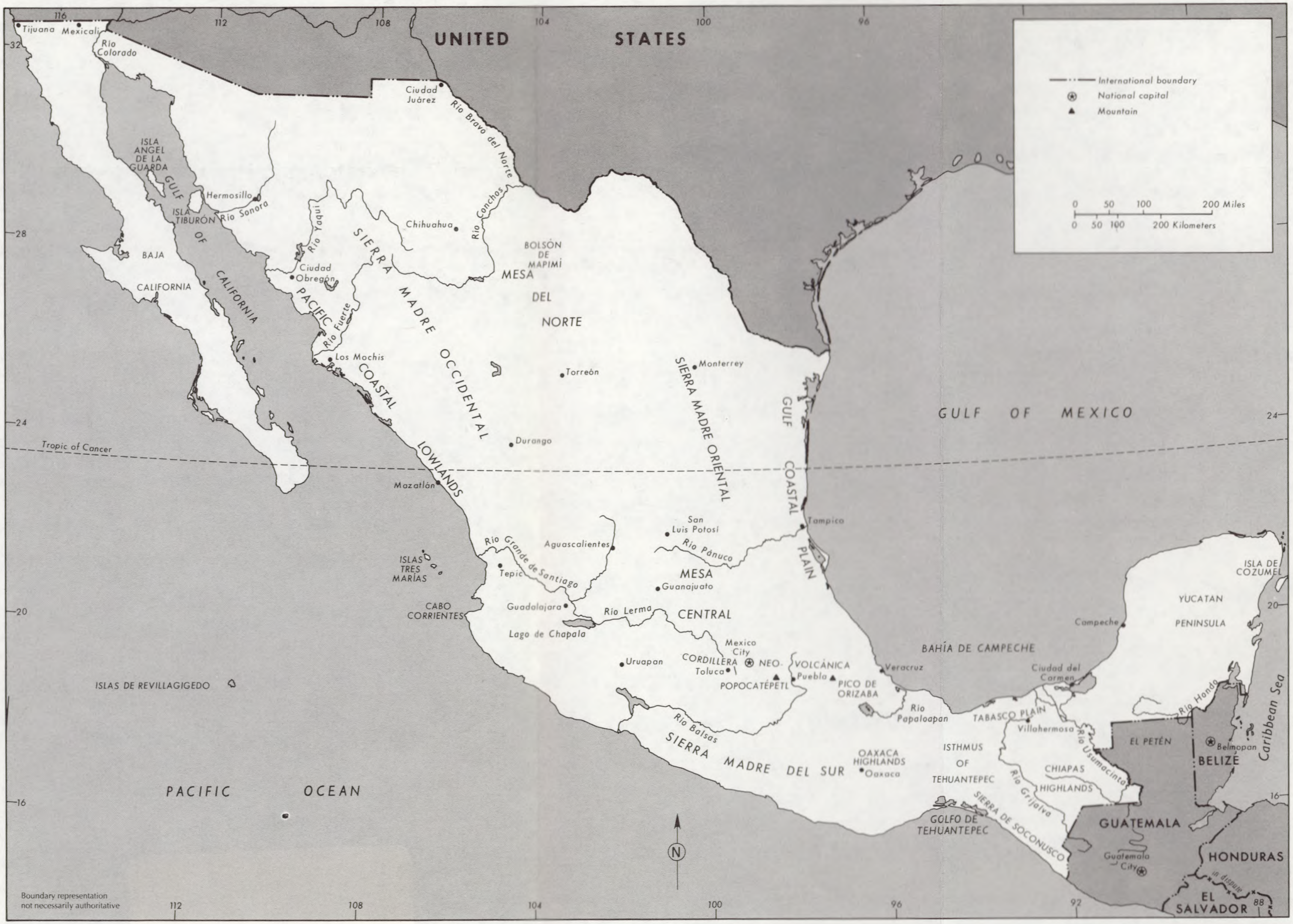
Urban Mexico has been dominated by the megalopolis of Mexico City. Having a 1984 estimated population of more than 15 million, the national capital was among the world's largest urban centers. Some sources even suggested that by the year 2000 or before it could become the world's largest city. Other large Mexican metropolitan areas included the cities of Guadalajara and Monterrey, each having a population of more than 2 million. Since the early 1950s Mexican cities have been growing continuously at very fast rates and thus have been unable to provide adequate services and facilities to their populations. Severe housing shortages and an inability to generate enough jobs to provide employment to all urban residents have become a part of the urban landscape. Despite this, migration from rural to urban areas continued.

Rural Mexico was marked by contrasts between the northern deserts and the southern jungles and between the highlands and the lowlands, but most importantly between the high technology, wealth, and sophistication of the privately owned, export-oriented haciendas of the northwest and the highly eroded, traditional small landholdings of the south. Mexico experienced the first Latin American land reform of the twentieth century during its early Revolutionary years, but the process of land distribution had not been officially concluded after almost seven decades of implementation. The Mexican countryside was full of landless peasants seeking jobs. The few well-paying jobs available were not located in the countryside but were in the nation's cities and in the United States. Thus, migration became a survival strategy for the rural poor.

Physical Setting

Mexico, covering an area of approximately 1,978,000 square kilometers, is the third largest (after Brazil and Argentina) nation in Latin America (see fig. 4). Its northern border with the United States runs 3,326 kilometers from the Pacific Ocean to the Gulf of Mexico and follows the Río Bravo del Norte (called the Rio Grande in the United States) east of Ciudad Juárez, Chihuahua. The main landmass of the country is in the general shape of a cone that narrows from its broad northern border to the Isthmus of Tehuantepec, where the land turns eastward, then northeastward to the Yucatan peninsula. In the southeast, Mexico shares an 871-kilometer border with Guatemala and a 251-kilometer border with Belize. Like the northern border, these are defined partly by natural boundaries, such as rivers (the Río Usumacinta and the Río Hondo, respectively), and partly by artificial boundaries.

Mexico's western Pacific coastline measures 3,974 kilometers (the coastline of the Baja California peninsula measures another 3,364 kilometers), and its eastern coastline on the Gulf of Mexico and the Caribbean Sea measures 2,805 kilometers. The narrow peninsula of Baja (Lower) California stretches south from Mexico's northwest frontier and is separated from the main body of Mexico by the Gulf of California. A number of sparsely inhab-


UNITED STATES
International boundary
National capital
Mountain
0 50 100 200 Miles
0 50 100 200 Kilometers
Tijuana
Mexicali
Río Colorado
Ciudad Juárez
Río Bravo del Norte
ISLA ANGEL DE LA GUARDA
GULF OF CALIFORNIA
Hermosillo
ISLA TIBURÓN
Río Sonora
Río Yaqui
Chihuahua
Río Conchos
BOLSÓN DE MAPIMÍ
MESA DEL NORTE
BAJA CALIFORNIA
Ciudad Obregón
PACIFIC COASTAL LOWLANDS
Río Fuerte
Los Mochis
SIERRA MADRE OCCIDENTAL
Torreón
Monterrey
SIERRA MADRE ORIENTAL
GULF COASTAL PLAIN
GULF OF MEXICO
Durango
Tropic of Cancer
Mazatlán
Tampico
San Luis Potosí
Río Pánuco
Aguascalientes
Río Grande de Santiago
Tepic
ISLAS TRES MARÍAS
MESA CENTRAL
Guanajuato
CABO CORRIENTES
Guadalajara
Río Lerma
Lago de Chapala
YUCATAN PENINSULA
ISLA DE COZUMEL
Campeche
BAHÍA DE CAMPECHE
Mexico City
CORDILLERA NEO-VOLCÁNICA
Uruapan
Toluca
Puebla
POPOCATÉPETL
PICO DE ORIZABA
Veracruz
Ciudad del Carmen
ISLAS DE REVILLAGIGEDO
Río Papaloapan
TABASCO PLAIN
Villahermosa
Río Hondo
EL PETÉN
Belmopan
BELIZE
Caribbean Sea
Río Balsas
SIERRA MADRE DEL SUR
OAXACA HIGHLANDS
Oaxaca
ISTHMUS OF TEHUANTEPEC
Río Usumacinta
CHIAPAS HIGHLANDS
Río Grijalva
SIERRA DE SOCONUSCO
GOLFO DE TEHUANTEPEC
GUATEMALA
Guatemala City
HONDURAS
EL SALVADOR
PACIFIC OCEAN
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Boundary representation not necessarily authoritative
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Figure 4. *Topography and Drainage*

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ited islands are also a part of Mexican territory. The two largest, Isla Tiburón and Isla Angel de la Guarda, are in the northern half of the Gulf of California. Isla de Cozumel and a number of smaller islands lie off the eastern coast of the Yucatan peninsula in the Caribbean Sea. A number of Pacific islands are insignificant except that they affect Mexico's claims to exclusive rights of economic exploitation off its west coast. The Islas de Revillagigedo, which extend over 600 kilometers westward from the Pacific coast of the state of Jalisco, for example, greatly enlarge the area (within 200 nautical miles of shore) that Mexico claims as its Exclusive Economic Zone off each coast. Mexico recognizes a 12-nautical-mile territorial sea.

Topography and Drainage

The Spanish conqueror of Mexico, Hernán Cortés, is reputed to have described the topography of the country by crumpling a piece of paper, throwing it down, and saying, "This is a map of Mexico." Mexico does have lowland areas, predominantly along its coastlines, but it is true that the topography of the area in between is defined by massive, often forbidding, mountain ranges.

North

The largest mountain range, in terms of area, is the Sierra Madre Occidental, which runs from the northern border south to the state of Jalisco, often reaching a breadth of 300 kilometers or more. The rugged nature of this range, which peaks in the state of Durango (several peaks are more than 3,000 meters high), is attested to by the fact that in 1984 only two means of surface transportation (a highway from Durango to Mazatlán and a railroad from Chihuahua to Los Mochis) traversed it.

All the major topographical regions of northern Mexico run north and south and can be viewed as extensions of regions of the southwestern United States. The Sierra Madre Occidental is an extension of the Sierra Nevada; the Sierra Madre Oriental, which defines the eastern edge of the highlands of northern Mexico, is the extension of the Rocky Mountains. The Sierra Madre Oriental runs from the border with Texas south to the northern part of the state of Puebla. Although narrower than the Sierra Madre Occidental, it reaches higher altitudes, peaking at over 3,700 meters in the state of Nuevo León.

Between these two parallel ranges lies a huge plateau, which averages about 1,000 meters in altitude at its northern end and slopes gently to twice that height at its southern terminus around San Luis Potosí, known as the Mesa del Norte. The Río Bravo del Norte, whose only major tributary in the Mesa del Norte is the Río Conchos, provides the only surface drainage out of this vast, dry region. As a result, it contains numerous *bolsones*, or basins, that intermittently form shallow lakes from rain runoff. The largest of these is the Bolsón de Mapimí, which consists of much of the area between Torreón and the country's northern border.

To the east of the Sierra Madre Oriental lies the Gulf coastal plain, the southern extension of the Texas coastal plain bordering on the Gulf of Mexico. This plain is quite wide at the Río Bravo del Norte but gradually narrows as it approaches its southern terminus north of Veracruz. It is traversed by a number of rivers draining the Sierra Madre Oriental, and the coast itself tends to be marshy and fringed by shallow lagoons and sandbars. Two of the country's major ports, Tampico and Veracruz, are on this coast; they are largely artificial, however, and must be dredged periodically.

On the opposite side of Mexico's wide northern region lie the Pacific coastal lowlands, sandwiched between the Sierra Madre Occidental and the Gulf of California. Narrower and longer than their counterpart facing the Gulf of Mexico, the Pacific coastal lowlands stretch from Mexicali south almost to Tepic, Nayarit. Although traversed by numerous rivers, these lowlands are considerably drier than those on the Gulf coast; their northern portion is the southern terminus of the Sonoran desert. Nevertheless, the damming of three rivers—the Colorado, Sonora, and Yaqui—has made some of the areas near Mexicali, Hermosillo, and Ciudad Obregón Mexico's most fertile (see Agriculture, ch. 3).

The peninsula of Baja California is extremely dry and is mountainous except for two desert plains that protrude on the Pacific Ocean side. An extension of the Pacific coast range in the United States, Baja California is some 1,200 kilometers long and between 50 and 240 kilometers wide. The most remote and economically marginal region (save the two important cities of Tijuana and Mexicali) in Mexico, Baja California was not served by a paved highway until the late 1970s.

Central

Central Mexico, as defined here, extends from approximately 22°C north latitude south to the lowland narrows of the Isthmus of Tehuantepec. The most mountainous area of Mexico, it contains both the Cordillera Neo-Volcánica (also known as the Sierra Volcánica Transversal) and the Sierra Madre del Sur, in

Guanajuato, a colonial mining town in the Mesa Central
Photo by Kathryn R. Stafford

addition to the Mesa Central.

The Mesa Central, which topographically is the southern extension of the Mesa del Norte, remains, as it was in the pre-Columbian era, the heartland of Mexico. Although only about one-seventh of the national territory, it encompasses one-half its population and is also the political and economic core of Mexico. The terrain consists principally of rolling hills and the dissected cones of thousands of old volcanoes interspersed with broad basins and valleys with floors that range in elevation from 1,500 meters in the northwest corner of the region around Guadalajara to some 2,300 meters in the Valley of Mexico, the location of Mexico City. The five largest of these basins and valleys extend west-northwestward from the basin of Puebla on the east through the Valley of Mexico and the basins of Toluca, Guanajuato, and Jalisco. The Verde Valley, to the north of Jalisco in the state of Aguascalientes, is also part of this geological formation. The distinction between the terms *valley* and *basin* is one based on common usage rather than on distinctive difference in topography.

The Valley of Mexico is drained internally into the Lago de Texcoco and other small and gradually receding lakes. The Basin of Puebla drains to the Pacific Ocean through tributaries of the Río Balsas; all the valleys to the west of Mexico City drain into the Río Lerma, which feeds the Lago de Chapala, the nation's largest lake, and the Río Grande de Santiago, which drains the Lago de Chapala and flows in a northwesterly direction toward its Pacific Ocean destination. The basins to the west of Toluca are interconnected and relatively level, and together they form an important subregion known as El Bajío (flatlands, or lowlands). The rich volcanic ash and lacustrine soils from old lake beds of El Bajío, together with the long growing season, make this area (roughly a triangle formed by Toluca, Guadalajara, and Aguascalientes) one of the most productive agricultural zones in the nation.

On the southern edge of the Mesa Central, nearly spanning the country from the Pacific Ocean almost to the Gulf of Mexico, lies the Cordillera Neo-Volcánica. Mexico's eight highest peaks are found in this range. The highest, Pico de Orizaba (also known as Citlaltepetl), at an altitude of 5,639 meters, demarcates the eastern edge of the range. The second and third in height, Popocatépetl and Ixtaccíhuatl, lie southeast of Mexico City and, together with the volcanic peak of La Malinche to the east of the capital, figure prominently in national folklore. Another famous peak is Parícutin, a volcano that rose dramatically out of a cornfield near Uruapan, Michoacán, in 1943 and a decade later had attained an elevation of some 2,700 meters. Because it runs perpendicular to the north-south orientation of the topography to the north, geologists often define the Cordillera Neo-Volcánica as the northern boundary of the isthmus of Central America. This range falls abruptly in the south to a depression formed by the Río Balsas. The Sierra Madre del Sur rises to the south of the Río Balsas and falls just shy of the Pacific Ocean. It is a long, narrow range that parallels the Pacific from Cabo Corrientes south to the Isthmus of Tehuantepec, leaving a very narrow coastal plain along the Pacific for most of its length. Near its southern terminus the Sierra Madre del Sur fans out into a broad range known as the Oaxaca Highlands.

Southeast

Southeastern Mexico includes all the territory east of the Isthmus of Tehuantepec. The narrowest point in the country, this lowland isthmus—approximately 250 kilometers wide—runs north and south between the Bahía de Campeche and the Golfo de Tehuantepec at approximately 95° west longitude. From there, a narrow band of lowlands borders the Pacific Ocean, southeast to the Guatemalan frontier. On the Gulf side the isthmus opens up to the broad Tabasco plain, which runs from Veracruz on the west to the Yucatan peninsula. The eastern terminus of this plain, from Villahermosa to Ciudad del Carmen, is swampy and riddled with lagoons and is also the location of some of Mexico's richest oil fields.

In a triangular area between these coastal lowlands are the Chiapas Highlands and, to their south paralleling the Pacific coast, the Sierra de Soconusco (also known as the Sierra Madre de Chiapas). Between these two mountainous regions is a broad depression formed by the Río Grijalva, which has been dammed in two locations in the state of Chiapas to create the two largest reservoirs in the country.

To the northeast, the Chiapas Highlands give way to the lowland tropical rain forest common to the southern Yucatan peninsula and the adjacent region of northern Guatemala known as El Petén. Moving northward up the Yucatan peninsula, the jungle gives way to tropical savanna, and the extreme northern end (which has approximately the same latitude as Tepic, Nayarit) is quite dry. Virtually the entire peninsula consists of a limestone platform, making it geologically unique within Mexico but similar to Florida. There is no surface drainage; underground rivers are accessible through numerous sinkholes, called *cenotes,* that dot the region.

Climate

Mexico experiences great variations in climate, both because of its considerable north-south extension and especially because of variations in altitude. The Tropic of Cancer, which demarcates the northern edge of the tropics, bisects the country just north of Mazatlán. It is a mistake, however, to view northern Mexico as temperate and southern Mexico as tropical. Rather, it is usual to divide the country climatically into three vertical zones, the *tierra caliente* (hot land), *tierra templada* (temperate land), and *tierra fria* (cold land).

The *tierra caliente* runs from sea level to approximately 1,000 meters in altitude. It includes all of the coastal plains, the Yucatan peninsula, Baja California, the Isthmus of Tehuantepec, and the north-central portion of the Mesa del Norte. The mean annual temperature in this zone is 24°C to 27°C, although it is not uncommon in some low-lying areas for temperatures to exceed

38°C. Except in the Mesa del Norte, the variation in temperatures between summer and winter is relatively small in the *tierra caliente*. Rainfall varies tremendously among the different areas: the Tabasco plain is the nation's wettest region, receiving in excess of 200 centimeters of rain annually, while Baja California, the northern Pacific coastal lowlands, and the north-central Mesa del Norte are all extremely dry, rarely receiving as much as 40 centimeters of moisture in a year.

The *tierra templada* is essentially the highland valleys that range from about 1,000 to 2,000 meters in altitude. This zone has the most favorable climate, and the mean annual temperatures range from 18°C to 24°C. Nights can be quite a bit cooler, but there is only a small temperature variation between the summer and winter months. In southern Mexico, May is often the warmest month, for the heavy afternoon rains during the months of June to September act to moderate the summer temperatures. The *tierra fria*, which begins above 2,000 meters, averages some 5°C cooler than the *tierra templada*. Summer temperatures are rarely hot in this zone, and frosts during winter nights are not infrequent. Temperature extremes are much greater in the mountains of northern Mexico.

It is estimated that only about one-eighth of the nation's territory receives adequate rainfall year-round. About one-half of the territory is deficient year-round, and the remaining three-eighths is deficient during the dry season. South of Tampico, prevailing winds are northeast trade winds that emanate from the Gulf of Mexico. Along the Gulf coast during the winters, strong, cold, northerly winds, called *nortes*, are common and are often destructive. The Caribbean and Gulf coasts are also subject to hurricanes during the summer and autumn months.

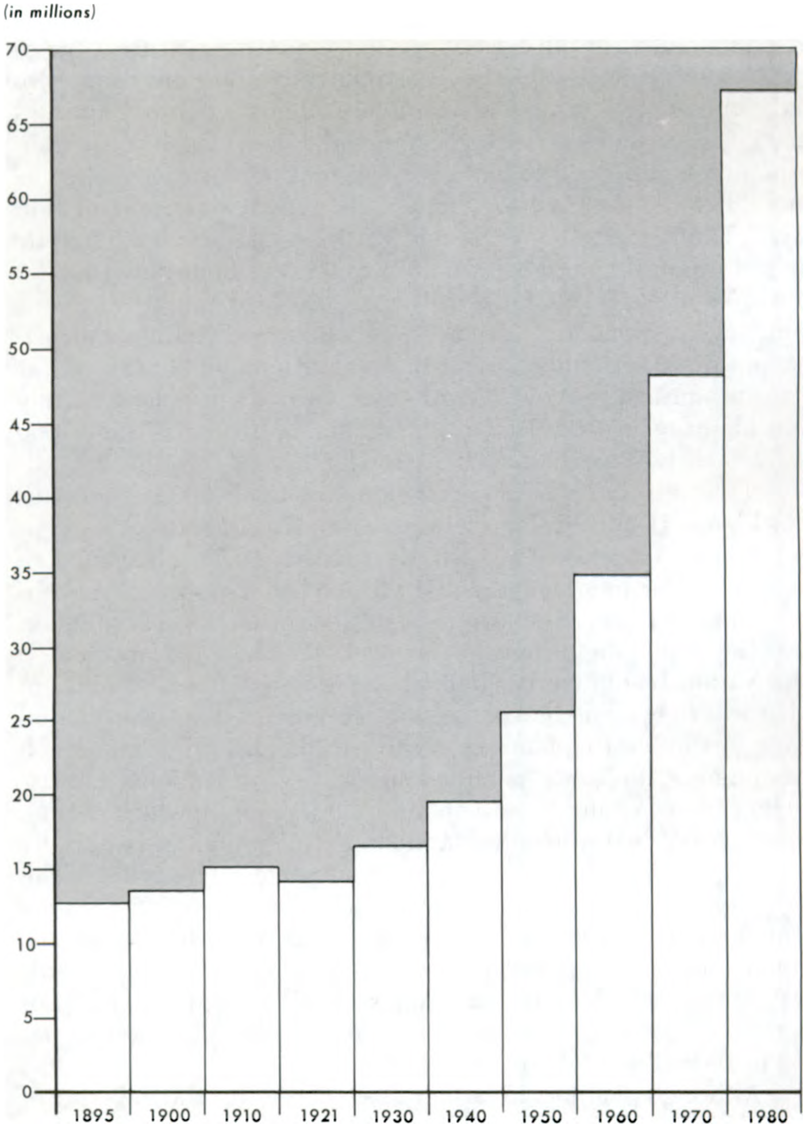
Population

The United States Bureau of the Census estimated the mid-1984 population of Mexico at 77.7 million persons, making it the world's eleventh most populous nation. This constituted a growth of just under 2 million from its mid-1983 estimate, representing an annual rate of growth between 2.5 and 2.6 percent. The official Mexican government estimate at that time was slightly lower: 76.7 million and a growth rate of 2.4 percent per annum. The tenth annual census, conducted in 1980, had counted 67.4 million Mexicans, but subsequent estimates by the National Population Council of the Secretariat of Government had revised that figure upward by nearly 2 million.

Mexican demographic history is little short of spectacular. The population of the area of present-day Mexico at the time of the Spanish conquest has been estimated by different sources to have been between 4.5 and 25 million. Almost a century later, in 1605, disease and warfare had claimed the lives of all but 1 million inhabitants (see New Spain, ch. 1). It took at least two centuries more before Mexico had attained its pre-Hispanic population level. The Revolution initiated in 1910 was another demographic debacle: population fell from 15.2 to 14.3 million between the censuses of 1910 and 1921. Although the Mexican government long held a pronatalist position (largely because of national security considerations and a strong Roman Catholic belief system), it was not until after World War II that Mexico's population really took off, growing from 19.7 to 34.9 million between 1940 and 1960 and to nearly 70 million by 1980 (see fig. 5).

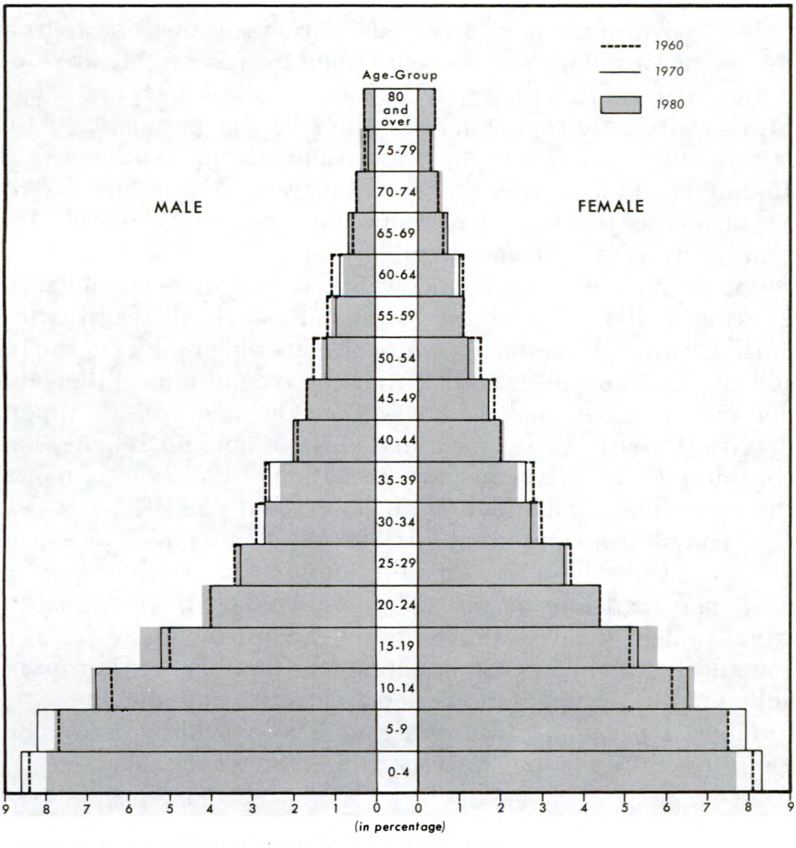
The country's rate of population growth also increased after World War II, from 2.7 percent per annum in 1950 to 3.1 percent in 1960 and 3.4 percent in 1970. By the early 1970s it had become clear to government leaders that Mexico had a "population problem," and in 1973 the government passed the General Population Law to replace the pronatalist law of 1947. The 1973 law created the National Population Council and marked the beginning of what was to become one of the most successful state-coordinated programs in family planning in the world. This program, which was ongoing in 1984, included innovative educational efforts, such as "social content" soap operas on televison, in which characters discussed contraception and family planning, and a rapidly growing availability and use of contraceptives. The goals of the program included lowering the population growth rate to 2.5 percent annually by 1982 and to 1 percent by 2000. The 1980 census, which found a decrease in population growth to 2.7 percent, dramatically revealed the program's success. Demographic projections to the year 2000 were suddenly revised downward from 132 to 100 million inhabitants.

Although planners breathed a sigh of relief at the lowering of the growth rate, the effects of the earlier demographic explosion would continue to be felt for years to come as Mexican youth strained the capacity of the education system, for example, and then entered an already glutted job market (see Education, this ch.; Labor Force, ch. 3). In 1984 fully 43 percent of the population were under age 15 (see fig. 6). Furthermore, the fertility rate (the number of children the average woman would bear were she to live from ages 15 to 49) of 4.7 was still considered too high. The in-



Source: Based on information from James W. Wilkie (ed.), *Statistical Abstract of Latin America*, 22, 1983, 64.

Figure 5. Population of Mexico, Selected Years, 1895–1980



NOTE--Data for 1960 and 1970 are actual census figures. Data for 1980 are from Mexican census but have been adjusted by United States Bureau of the Census.

Source: Based on information from Patricia M. Rowe, "Detailed Statistics on the Urban and Rural Population of Mexico: 1950 to 2010," Washington, August 1982, 19.

Figure 6. Population by Age and Sex, 1960, 1970, and 1980.

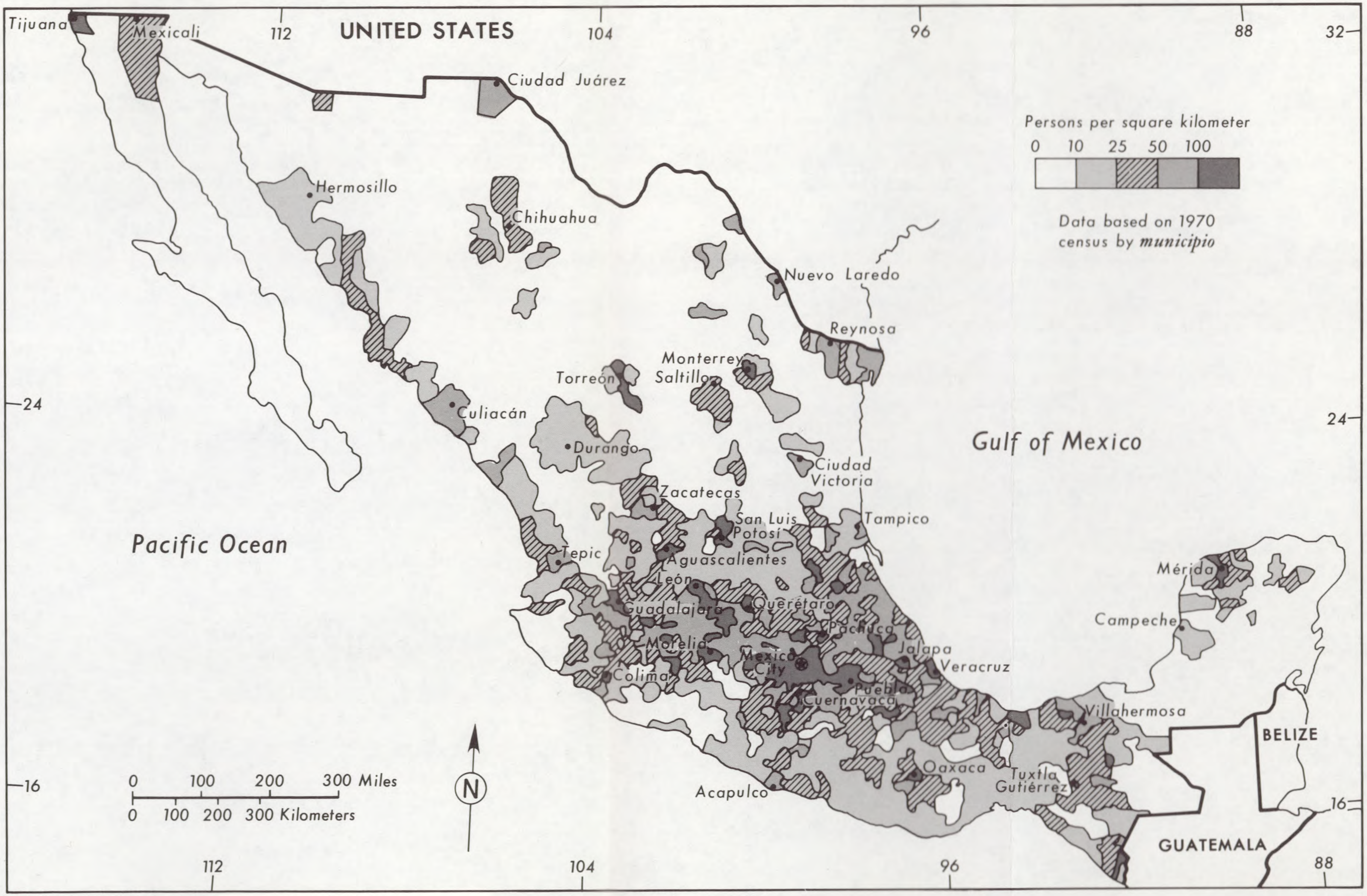
fant mortality rate, 55 per 1,000 live births, was in decline but was also unacceptable to planners. Life expectancy was estimated in 1984 at 66 years (68 for women and 64 for men), up from 50 years in 1950 and 59 years in 1960.

The unequal distribution of the nation's population and particularly the growth of metropolitan Mexico City continued to be a problem in 1984 that, unlike the total population growth rate, showed no signs of improvement (see fig. 7). Despite nearly a decade of governmental efforts to decentralize growth away from the nation's capital, migrants continued to arrive in Mexico City from all parts of the country at the rate of about 1,000 per day (see Mexico City's Metropolitan Area, this ch.). The population of the metropolitan area at that time was variously estimated at between 15 and 17 million, thus vying with New York City and Tokyo-Yokohama as the largest metropolitan area in the world. The problems created in terms of congestion, pollution, and strains on services, such as housing and water, were immense and were growing in 1984. The country's second and third largest cities, Guadalajara and Monterrey, were also growing rapidly as the result of significant in-migration, but the magnitudes of their difficulties were overshadowed by Mexico City (see table 2, Appendix). In the early 1980s an estimated 50 million inhabitants were considered to be urban dwellers (in settlements of 2,500 or more); this figure had been under one-half as recently as 1960.

The other major outlet for Mexican demographic pressures was the United States. In addition to the "push" factor of economic hardship magnified by population growth, Mexicans were "pulled" to the United States by the lure of the prosperity of their northern neighbor. Estimates of the number of Mexicans residing in the United States varied greatly; 2 to 4 million were the numbers most widely reported (see The Northern Border Region, this ch.; Relations with the United States, ch. 4).

Ethnic Categories

Anthropologists have traditionally divided the Mexican population into two ethnic categories, the Indian and the mestizo (sometimes known as ladino). North of the Isthmus of Tehuantepec the term *mestizo* was normally used, while south of the isthmus, especially in the state of Chiapas, persons of mixed Indian-Hispanic heritage were called ladinos. However, in the Yucatan peninsula the concept of "mestizo"—not ladino—had a completely different meaning; it referred to the indigenous Maya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Culiacán
Durango
Ciudad Victoria
Zacatecas
San Luis Potosí
Tampico
Tepic
Aguascalientes
León
Guadalajara
Querétaro
Pachuca
Morelia
Mexico City
Jalapa
Veracruz
Colima
Puebla
Cuernavaca
Villahermosa
Oaxaca
Tuxtla Gutiérrez
Acapulco
Mérida
Campeche
BELIZE
GUATEMALA
Gulf of Mexico
Pacific Ocean
Persons per square kilometer
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Data based on 1970 census by *municipio*
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Figure 7. Population Density, 1970

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speaker who also wore traditional dress. Therefore, as anthropologist Julian Pitt-Rivers contended, it was virtually impossible to make any statement about Indians or mestizos that was applicable nationwide. These concepts referred to highly qualitative and heterogeneous ethnic categories. Their usage frequently came loaded with emotions because of the unfortunate implicit correlation between ethnic-racial groups and social classes. Nevertheless, during the mid-1980s these concepts were still used in academic circles and, occasionally, in domestic parlance.

This Indian-mestizo dichotomy was the historical product of more than 300 years of often violent confrontation, economic exploitation, political control, and racial discrimination. The dichotomy was softened by acculturation and peaceful miscegenation between these two ethnic groups. During the colonial period, in order to justify the status quo, Spaniards imposed the idea that social status was determined by one's descent rather than by his or her wealth or education. Spaniards, in short, were "superior" to indigenous Americans.

In the 1980s the terms *indio* (Indian) and *mestizo* continued to be used colloquially, albeit in a limited sense, despite their varying connotations. In common parlance, *indio* was usually a term of denegration. In official parlance, though, Mexico prided itself on being the heir of two civilizations and on having a culture that was a combination of both. The achievements of the Olmecs, Zapotecs, Toltecs, and Maya, culminating with the rise and fall of the Aztecs, were systematically recalled. Cuauhtémoc, the last Aztec ruler, who, despite torture, refused to surrender to the Spaniards, was usually portrayed as a model of heroism and nationalism (see The Aztecs, ch. 1). As evidence of this official attitude, the Mexican government has systematically highlighted the Indian contribution to Mexican society. In the early 1960s President Adolfo López Mateos authorized the construction of the impressive 125,000-square-meter Mexican National Museum of Anthropology. The museum received international acclaim as a place for Mexican nationals and foreign tourists to learn about, admire, and venerate the great diversity of past and present societies and cultures.

Indians

A common assertion in Mexico during the 1980s was that it was still possible to find ethnic groups that were the direct "pure-blooded" descendants of the pre-Hispanic Indian societies. Sometimes it was even claimed that the 55 contemporary Indian societies that still lived in Mexico were mostly "untouched" by Western civilization. Mexican anthropologist Gonzalo Aguirre Beltrán, who served, among other posts, as director of the National Indian Institute and as subsecretary of public education, strongly opposed those oversimplified points of view. He suggested that Indian societies lived mainly in *regiones de refugio* (literally, regions of refuge), made up of a number of villages, as a rational defensive reaction to hundreds of years of abuse and exploitation.

Indian exploitation was not only a characteristic of the Spanish conquerors but was also a by-product of the nineteenth-century liberal Reform policies of President Benito Juárez (himself an Indian) and the positivist-inspired ideas suggested by President Porfirio Díaz' advisers, known as the *científicos*. Thus, nineteenth-century Indians had to protect themselves from government policies aimed at integrating their communities into the larger society in the name of "progress." For example, the Lerdo Law (1856) forced Indian villages to surrender their properties for sale at various auctions. At the turn of the century the *científicos* maintained that Mexican Indians were hopelessly inferior.

Aguirre Beltrán and a colleague, Alfonso Caso, played very important roles in helping to define and implement the Mexican government's post-World War II Indian policies. Under their influence, the government pursued, with mixed success, policies that would not only seek the Indians' integration into national life while fully respecting their individual personalities and culture but would also develop communities and integrate them into an environment where both the Indian and the non-Indian were free citizens with equal rights.

It was extremely difficult to generalize about Mexican Indians. Over the years the concept of who is an Indian has changed. During the 1980s anthropologists defined an Indian as a member of an indigenous ethnic minority who prides himself on belonging to it. Traditionally, a majority of the Indians lived in parochial, self-sufficient, agrarian (or agrarian-artisan), landowning communities, although a few continued to be hunters and gatherers. Indian villages usually differed from other neighboring Indian or non-Indian villages or communities in their cultural characteristics, such as language, life-style, and dress. Furthermore, the cohesion of such communities resulted from their social structure and worldview, their belief systems, and their internal mechanisms of social control.

Membership in an Indian ethnic group, although a source of pride and honor for many, was no longer a lifelong indicator of lower status and poverty. The technological and commercial revolutions of the nineteenth century, as well as the industrial and telecommunications revolutions of the twentieth century, penetrated and integrated the Indian communities into society to various degrees. Village life-styles changed because of acculturation and syncretism. Many Indians left their villages to seek work in nearby haciendas, towns, cities, or even in the United States. Upward social mobility was possible. Therefore, in accordance with the popular expression "money whitens Indians"; those who decided to cross the ethnic group boundary line or the social class barrier could indeed succeed, but not without considerable effort and hardship.

The Mexican government has approached the problem of determining who is an Indian in a more restrictive way. Thus, since 1940 the number of Indians in Mexico has not really been known. Since that time, the government census has no longer used race as a variable even though it has added cultural characteristics, such as language, eating habits, clothing, and footwear. For statistical purposes the aboriginal language criterion replaced the racial standard, and all available linguistic data indicated a decrease in the number of non-Spanish-speaking, monolingual, indigenous Mexicans. For example, in 1877 it was estimated that 38 percent of the population spoke only aboriginal languages; in 1921 the figure was reduced to 14.7 percent; in 1930 to 7.2 percent; in 1940 to 6.29 percent; and so on, reaching the 1.8 percent figure in 1970.

In 1979 anthropologists Enrique Mayer and Elio Masferrer published a carefully researched study of the indigenous population of the Americas. In the case of Mexico, they acknowledged that there were demographic, geographic, economic, and political dissimilarities among the different Indian groups. In terms of demographics, for example, they quoted the ninth national census of 1970. Based exclusively on the language criterion, the largest Indian groups included central Mexico's Náhuatl (1 million) and the Yucatan peninsula's Maya (555,000). The smaller groups comprised Baja California's Cochimi (100), Kumiai (100), and Pai-Pai (275), as well as Chiapas' Lacandón Indians (400), among others. However, contrasting the restrictive census definition of Mexican Indians with the wider anthropological definition, Mayer and Masferrer suggested that in 1978 at least 12.2 percent (or 8 million inhabitants) of Mexico's population were Indians. Their estimates included monolingual, bilingual, and Indian migrants to cities.

Mestizos

Literally, a mestizo is a person of mixed blood, the offspring of "white" and Indian parents. The meaning of the term *mestizo* has changed, however, since it was first used in sixteenth-century Mexican society. During colonial times mestizos always occupied the lower echelons of the dominant society. The term was basically a racial concept that served to distinguish between the "pure white" stock of the Spanish conquerors and that of their offspring from Indian women. Through the years, however, the racial connotations of the term gradually disappeared, and mestizo became an ethnic category. It came to be used to emphasize the non-Indian social and cultural characteristics of Mexican society. Moreover, many totally acculturated Indians started to call themselves mestizos.

During the early twentieth century a group of distinguished Mexican scholars began to rethink the nature of Mexican society in terms of Mexicanidad ("Mexicanness"). Among these, Mexican educator José Vasconcelos (1882–1959) played a very important role. In his 1925 book, *La Raza Cósmica (The Cosmic Race)*, Vasconcelos stressed the uniqueness of Mexican society, a result of the positive contributions of diverse racial stocks, creating what he termed a "cosmic race" (see Education, this ch.). This rethinking resulted in the Mexican government's de-emphasis on ethnic categories.

By the 1980s the concept of mestizo, as well as that of its equivalent, ladino, had practically disappeared from the nonacademic lexicon. When used, it was tacitly assumed that the majority of Mexican society was mestizo. Mestizos and mainstream Mexicans appeared as synonymous; mestizos had become one of the most distinctive sociological elements of Mexicanidad. Mexico had become a mestizo nation; its citizens acknowledged it with pride.

Social Stratification

Mexican sociological literature has traditionally divided the society into three very broad and intrinsically heterogeneous social classes: the upper class, the middle class, and the lower class. The specific definition of each class, as well as the percentage of the total population that it comprised, varied from one author to another. Different theoretical models and methodologies also contributed to different conclusions. For example, in 1970 sociologist Pablo González Casanova compared the results of three classic studies on Mexican social stratification: Howard F. Cline's, Arturo González Cosío's, and Ifigenia Martínez de

Residents of Mexico City
Photos by Arturo Salinas

Navarrete's. Their estimates of the relative size of each class, although varying from one another, each indicated the existence of vertical mobility—both upward and downward—within Mexican society.

According to Cline, between 1895 and 1960 the upper class grew from 1.5 percent to 6.5 percent of the total population; the middle class grew from 7.8 percent to 33.5 percent; and the lower class decreased from 90.7 percent to 60 percent. According to González Cosío, between the years 1900 and 1960 the upper class decreased from 0.6 percent to 0.5 percent of the population, while the middle class grew from 8.3 percent to 17.1 percent and the lower class decreased from 91.1 percent to 82.4 percent. Finally, according to Martínez de Navarrete, during the 1950–57 period the upper class remained stable at 5 percent of the total population; the upper middle class increased from 7 percent to 11 percent; the middle class slightly increased from 18 percent to 19 percent; and the lower class decreased from 70 percent to 65 percent.

Manual labor was perhaps one of the most important indicators of social class. According to beliefs that date back to colonial times, upper-class and middle-class members must never get involved in manual activities if they do not want to lose status and prestige. Manual activities are the domain of the lower classes, *la clase obrera* (the blue-collar workers). The *gente decente* (the so-called decent or respectable people) and the *empleados* (the white-collar workers) should avoid them.

Friendship, patronage, membership in a political party, and reliance on a large network of relatives were important elements for class affiliation and sometimes for social mobility. Jobs, fringe benefits, educational and career opportunities, government licenses and permits, bank loans, and salary increases were among the many issues that normally were decided behind the scenes on the basis of personalistic criteria. Personal qualifications were essential but not sufficient. Therefore, it was extremely important to cultivate and/or strengthen personal relations with the right people in the right places. Membership in networks based on personal loyalty to a power broker was critical. The broker funneled down scarce resources (e.g., power, goods and services, information, capital, and jobs), in exchange for loyalty or political support for his cause.

Multiple employment was another important characteristic of Mexican society. Over the years, as a result of the rising cost of living, economic inflation, and the decrease in the purchasing power of their salaries, many blue-collar and white-collar workers had to engage simultaneously in different jobs to make ends meet.

The combination of jobs varied with the individual's qualifications and with the place he or she occupied in the socioeconomic hierarchy. Usually it included part-time with full-time jobs, daytime with night jobs, or formal sector with informal sector jobs (see The Urban Society, this ch.). Those engaged tended to consider their multiple jobs as a necessary and somehow indispensable year-round source of income.

Social mobility, that is, a change in role and status that involved a change in the social class position, was a common phenomenon in many Mexican areas. In most cases, upward mobility required physical or geographic mobility. For example, this was the case with Indians, who, after finishing grammar school, migrated to a major city, where they became skilled workers. And Mexico, contrary to other Latin American countries with large Indian communities, could pride itself on having one of the most open class systems in Latin America. However, openness could not be interpreted as being synonymous with easy mobility. Major social, cultural, economic, and political barriers existed. But the system, seen as a whole, tolerated and accepted the upwardly mobile. A classic example is Benito Juárez (1806–72), a Zapotec Indian born in an isolated Oaxaca village, who became one of Mexico's most respected presidents.

Income Distribution

Economists Jeffrey B. Nugent and Fayez A. Tarawneh pointed out in an article published in 1983 that income inequality increased in Mexico despite the nation's economic development during the 1950s and 1960s. The incidence of poverty only moderately diminished among the members of the economically active population, that is, the population between the ages of 12 and 64. Income inequality increased the most among those engaged in agriculture, especially those in the poorest states. Poverty, they argued, had increasingly become a rural problem.

Most of the available published data were analyses of income distribution during the 1970s. Because of the lack of homogeneous indicators and existing differences among various sources, data on income distribution should be referred to with caution.

In 1979 economists Enrique Hernández Laos and Jorge Córdoba Chávez published a study on the structure of income distribution in Mexico. According to their figures, in 1977 the wealthiest 10 percent of the population received about 38 percent of the total national income (see table 3). The poorest 10 percent of the population received only about 1.1 percent of the total national income. According to the authors, "The gap between the rich and poor families has widened: in 1958 the wealthiest 5 percent had an income 22 times larger than the poorest 10 percent of the families; in 1970 this relationship became 39 times. Even in the 1968–77 period, when the global distribution seemed to improve, the gap continued to grow [in Mexico]: from 44 times it became 47; that is, 5 percent of the wealthiest families had an average income nearly 50 times that of the poorest 10 percent."

According to the World Bank's *World Development Report, 1984*, Mexico's income distribution continued to be characterized by income inequality. Working also with 1977 data on household income, the World Bank (see Glossary) reported that the wealthiest 10 percent of the population received 40.6 percent of the national income. The poorest 20 percent of the population received only 2.9 percent of the national income.

A second indicator of income distribution is the average monthly household income. According to the Secretariat of Programming and Budget, 51.6 percent of the population had monthly incomes equivalent to about US$139 or less, as of 1977, while 2.6 percent of the families earned the equivalent of US$792 or more. The average monthly household income for the latter category was US$1,231 (see table 4).

A third indicator of income distribution involves an analysis of the gross domestic product (GDP—see Glossary) generated in each state. The five states and administrative divisions that generated the highest percentage of GDP in 1980 were the Federal District (25.1 percent), México (9.8 percent), Jalisco (6.5 percent), Veracruz (6.2 percent), and Nuevo León (5.9 percent). The five poorest states were Quintana Roo (0.3 percent), Baja California Sur (0.4 percent), Tlaxcala (0.5 percent), Campeche (0.5 percent), and Aguascalientes (0.6 percent). These figures show dramatically an image of regional differences within Mexico, where 53.5 percent of GDP was concentrated in only five of the country's 32 administrative divisions. However, 43 percent of the total Mexican population lived in these five administrative divisions. Nevertheless, this regional maldistribution of income helped to explain why rural dwellers continued to migrate from the economically depressed rural areas to the more industrialized and developed urban areas.

In 1980, according to official figures, Mexico had an economically active population of about 20 million workers in a total population of 67.4 million inhabitants. That same year the per capita income (GDP per person) was the equivalent of US$2,749. There were also, however, income inequalities among the nation's various economic sectors.

The agricultural sector, composed of a work force of 4.1 million (26 percent of the working population for 1980), had the lowest annual average income, equivalent to US$198. On the other end of the spectrum, the electric industry's work force of 62,881 (0.3 percent of the national working population) had the highest annual average income (US$6,021). In other words, electric industry workers earned in 1980 an annual average income 30.5 times that of those engaged in agriculture.

Hidden within official government figures was the annual average income of the self-employed at both extremes of the income scale. At one end of the scale were peasants who worked their tiny plots of land in isolated rural villages. In 1977 the Mexican weekly *Proceso* published an article by Miguel Angel Rivera claiming that at least 3.5 million peasants lived on an average of the equivalent of US$0.04 a day, although it acknowledged that they had other nonmonetary sources of sustenance. At the other end of the scale were a small number of wealthy professionals and private sector businessmen and industrialists with annual incomes over US$100,000.

An additional element that worsened the quality of life of the majority of Mexicans was the severe economic and financial crisis that hit Mexico during 1982 and forced the government to implement a rigorous austerity program (see Growth and Structure of the Economy, ch. 3). For a majority of Mexicans, austerity meant a cut in subsidies and basic foods, a measure that led to the skyrocketing of prices, which rose by 100 percent in 1982. The purchasing power of the population was severely curtailed as real wages fell by more than 25 percent. There was also a severe shortage of jobs. Unemployment and underemployment grew dramatically by early 1984, sharply worsening the long-standing problem of the inequality of income distribution.

The Urban Society

The Lower Class

The urban lower class, perhaps the largest and most heterogeneous of all Mexican social classes, has increasingly become differentiated in skills, income, and status. For analytical purposes, its members could be situated along a continuum that ranged from the skilled, unionized, blue-collar workers who were employed by the large industrial, service, or extractive industries, to the unemployed or underemployed very poor masses who lived in recycled cardboard or wooden shacks on the city's fringes.

A sampling of the variety of housing in Mexico City

Photos by Arturo Salinas

Mexican law contained a clearly defined and comprehensive set of principles, norms, and rules relating to its blue-collar workers. The government periodically set the legal minimum wage, which varied from state to state and within each state as well. In 1983, for example, legal minimum wages ranged from a maximum of US$3.52 per day to a minimum of US$2.19 per day. However, in practice, a relatively large but unknown percentage of the lower class either earned less than the legal minimum wage or worked longer hours without receiving overtime pay.

Article 123 of the Constitution of 1917 is devoted to the principles of labor legislation. A thorough piece of legislation, Article 123 has two sections. Section A is addressed to "workers, journeymen, artisans, and broadly, to all contractors," including all industrial workers. Section B addresses those who work for the federal, state, and local governments, most of whom were considered to be within the middle classes. The Constitution encourages, although does not compel, workers within the Section A category to belong to labor unions. Article 123 guarantees unions the right to strike, as well as control over hiring and firing. These workers also have their own social security system under the auspices of the Mexican Social Security Institute (Instituto Mexicano del Seguro Social—IMSS).

Organized labor constituted the lower class's most privileged sector. It represented only 22.9 percent of the total employed population, according to the 1970 census. Within it the largest and most powerful labor confederation was the Confederation of Mexican Workers (Confederación de Trabajadores Mexicanos—CTM), which had an estimated membership close to 2 million in 1974. Formally a member of the ruling party, the CTM's secretary general was acknowledged as the most powerful labor spokesman in Mexico (see Labor Groups, ch. 4). Moreover, as a result of the policy of co-optation by the government, CTM members received generous rewards in the form of political posts, steady jobs, greater social benefits, and a guaranteed income. In exchange, union members were to become "clients" of the union leaders as well as of their factory supervisors. Through union leaders the government assured its control over the workers. Partly as a result of political tensions, independent, i.e., nongovernment affiliated, unions were commonplace in the early 1980s.

A large portion of the urban labor force was not organized into labor unions and, for the most part, could be described as impoverished marginal workers. These workers were usually immigrants from economically depressed rural areas. In 1984 it was speculated that Mexico City alone received about 1,000 jobless peasants each day. However, the system was no longer able to incorporate them: few jobs were available, and adequate housing was increasingly scarce.

Unemployment and underemployment were common among the nation's lower classes in the early 1980s. In 1983 nationwide unemployment was estimated conservatively at 13 percent, up from the 8 percent of the previous year. The underemployment rate, i.e., people working in substandard jobs, earning subminimum wages, or being unable to work a full day, was estimated to be an additional 20 to 25 percent. The magnitude of the unemployment problem in 1983 was indicated by the loss of the jobs of more than 1 million Mexicans as a result of the 1982 crisis. To this figure could be added the number of people entering the labor force who were unable to find jobs during that same period.

As a result of unemployment and underemployment, many Mexicans began to experience extreme poverty. An increasingly large marginal sector, also known as the "informal economic sector," developed. In 1979 the Mexican government estimated that these "marginals" accounted for 35.5 percent of Mexico City's work force. Similar percentages could be speculated on for other major urban areas. Its members—men, women, children, and the aged—worked for a pittance as porters, small-scale workshop employees, messengers, domestic servants, shoe shiners, and street vendors, among many other activities. Informal economic sector members not only lacked stable employment but did not benefit from labor legislation, legal minimum wage, social security, public housing, or other public policies. Their jobs were usually temporary and intermittent. Included in these were the estimated 2,500 regular *pepenadores* (rubbish pickers) who in 1984 earned their living by picking out resalable items at Mexico City's Santa Fé garbage dump.

Child labor also became a common feature throughout Mexico's urban and rural areas. The situation worsened as a result of the 1982 economic crisis. In 1978 the government had conservatively reported that nationwide, at least 1.8 million minors under age 16 were working for a salary. Many of those under 14 years old worked in violation of Article 123 of the Constitution and the federal Labor Code. In urban areas children worked as factory "trainees," car mechanic "apprentices," and in petty-trade street vending operations.

Furthermore, the urban poor were the worst victims of the 1982 economic crisis. Living standards deteriorated rapidly owing to increasing unemployment, subsidy reductions, and the loss of purchasing power. From December 1982 to July 1984 the government increased the minimum wage—which constituted the major source of income for a large percentage of the urban population—by 124 percent, while the official price index rose 161 percent. In 1983 an opposition political party conducted a study to estimate the economic daily minimum survival requirements for an average family of five living in the Federal District. Their findings suggested that the equivalent of US$13.45 was necessary barely to make ends meet. However, the daily minimum wage for the Federal District at that time was only US$3.50.

As a result, families began to cut back their diets in order to make ends meet. According to a 1984 study by the Mexican National Consumer Institute, about 70 percent of lower income families had stopped eating rice, eggs, fruits, vegetables, and milk. They were replaced by more tortillas and beans. Lard was substituted for cooking oil. Thus, the incidence of malnutrition was increasing.

Another way of making ends meet was to cut housing costs by building shacks in the outlying parts of the cities. These squatter settlements, the result of a chronic housing shortage, had long existed because of rapid demographic growth and a lack of private investment capital for new housing. Overnight, squatters would invade private land or public land situated outside the city limits. Shacks were hastily built, and families moved in. Consequently, millions of people lived in neighborhoods not previously subdivided that lacked running water, sewage facilities, electricity, public schools, and health facilities.

The Middle Class

The middle class was the second largest social class in urban Mexico during the early 1980s. Estimates of its size varied from 17 percent to 35 percent of the population. However, all authors agreed that it continued to grow as urbanization and industrialization proceeded. This growth could be attributed to, among other factors, the upward mobility of lower-class members and, to a lesser extent, the downward mobility of upper-class members.

Highly heterogeneous and complex, the middle class was fundamentally composed of four social groups. The first, civil servants and white-collar private sector workers, was dependent on salaries for its livelihood. Self-employed professionals, the second group, included most of the nation's university degree- holders in all fields and disciplines. The third group comprised the owners of small-scale industries or businesses, including the managers of service and manufacturing firms. Finally, the middle class included the owners of artisan or handicraft stores that catered to the middle and upper classes.

Tangible and nontangible prestige symbols have played a very important role within the middle class. Most important have been both the conscious effort to follow the standards set by the upper class in terms of life-style, etiquette, dress, and language and the negative value attached to manual labor.

So-called proper behavior has been one of the distinctive elements that characterizes middle-class members. A highly qualitative element, it implies behaving according to unwritten standards that allow one to belong to the so-called *gente decente*. As anthropologists Douglas Butterworth and John K. Chance have suggested, proper behavior implies being at ease with an extensive repertoire of "refined" manners that are often difficult to learn if one has not been born into the middle class or at least participated in it for some time. Properness also implies the use of the "right" language. Since the 1950s, however, as a result of the widespread use of television and the popularity of Mexican-made television series and movies, middle-class "proper" behavior has become easier to learn, especially for lower-class persons aspiring to upward mobility.

Middle-class members do not see their class as an acceptable end in itself. The middle class is perceived by many as an intermediate step in a lifelong process of upward mobility. Therefore, they feel the need to acquire the largest amount of perceived upper-class symbols. They strive to own or rent a stylish home or apartment and to furnish it lavishly with modern electronic equipment and electrical appliances. Their houses are to be cared for by one or more live-in maids; their children are expected to attend private schools and universities. Family members are expected to be dressed in fashionable imported clothes; the family automobile is supposed to be modern and expensive. Obviously, all these demands can place a heavy strain on the family budget, especially during a period of spiraling inflation and economic recession, such as the early 1980s. Lavish expenses of the past were generally curtailed then.

Economic aggrandizement at any cost has been seen by some as a means to move into the upper class. This helps explain the tradition of the *mordida* (literally, bite, but meaning a bribe) found and widely tolerated at all levels throughout Mexican society (see The Rules of Political Competition, ch. 4). Bribes have been perceived as an accepted, albeit illegitimate, way to obtain additional resources. The building up of fortunes by modestly paid middle-class members in this way has been considered feasible by many.

The middle class was the main beneficiary of the Mexican Revolution, its members' lives improving greatly from the political and economic arrangements that were put into effect in its aftermath. In 1938 the ruling party was divided into sectors, one of which, the popular sector, was created for the middle class (see Institutional Revolutionary Party, ch. 4). Made up of civil servants, professionals, intellectuals, women's organizations, and youth groups, among many others, the popular sector continued, nearly a half-century later, to be considered by many as the most powerful element within the Institutional Revolutionary Party (Partido Revolucionario Institutional—PRI). As a result, during the 1980s, despite the economic crisis, middle-class members still benefited from the goods and services that were distributed systematically by the government as part of its policies of co-optation.

Government workers (those described in Section B, Article 123, of the Constitution of 1917) technically were not part of the organized labor sector. Rather, they were considered a part of the public sector. They were organized in unions, many of which, such as the Federation of Labor Unions of Workers in the Service of the State, were powerful. They were limited in their legal rights, however, including the right to strike. Government workers also had their own social security system, called the Security and Social Services Institute for Government Workers.

Employment by the government or dependency on government contracts continued to be one of the main sources of income for middle-class members. This was especially the case in Mexico City, where 1.5 million bureaucrats worked in the early 1980s. Civil servants, especially the low-paid teachers, constituted one of the largest middle-class groups. Government employees were expected to be on good terms with both the government and the ruling party in order to benefit from the goods and services that these entities traditionally distributed. At stake were such matters as job tenure, career advancement, the provision of low-cost government housing, social security, pension plans, and other fringe benefits.

In 1979 it was estimated that there were 4 million federal and state employees. They worked in the federal government's 18 cabinet-level agencies, 123 decentralized agencies, 292 federally owned corporations, 187 official commissions, and 160 development trusts, plus similar agencies in the state and local governments. Because the authoritarian structure of the Mexican political system concentrates the power of appointment in the presidency, the election to that office of a new individual every six years meant the complete rotation throughout the system of a new group. Using conservative numbers still commonly cited two decades later, Frank R. Brandenburg, a North American professor of political science, estimated in 1964 that "every six-year administration witnesses a turnover of approximately 18,000 elective offices and 25,000 appointive posts" (see Institutional Structure, ch. 4). Patronage in the form of patron-client relationships, somewhat analogous to the old spoils system in the United States, was critical throughout the system. Also, after each presidential election a significant number of individuals retired from the political arena.

The Upper Class

The upper class was the smallest and least studied social class in Mexico. The composition of the modern upper class was largely a product of the twentieth century; it was completely restructured after the Revolution. Post-Revolutionary centralization of power in the authoritarian state governed by the PRI dismantled the old social and political order and provided the ideological outlines for the new Mexican social system.

The Mexican upper class was not monolithic. There was little overlap between the different economic and political groups within it. Class affiliation did not necessarily imply membership in a self-perpetuating elite. Upward mobility from the middle class was possible and relatively common, as was mobility downward from the upper class.

In the 1980s the upper class was largely made up of two separate, albeit subtly interrelated, elites: the economic elite and the political elite. Furthermore, within the economic elite two subgroups, the urban-based industrial and commercial elite and the rural-based landowning elite, could be identified.

Upper-class members tended to be highly educated, well traveled, and cosmopolitan. Usually they were well acquainted with Western technology and values. They also carefully followed national politics and attempted to influence those legislative issues that might affect their economic or political interests. They tended to think of themselves as members of an elite group that set the national standards of behavior for the rest of the nation.

The 1982 financial crisis that was precipitated by an overvalued exchange rate resulted in a considerable amount of capital flight out of Mexico (see Balance of Payments, ch. 3). The upper class reacted by opening foreign bank accounts and by investing in foreign real estate. Estimates of the amount deposited overseas varied; one 1984 press account reported estimates by Mexican officials stating that in 1983 alone Mexican nationals deposited US$15 billion in banks throughout the United States and invested a similar amount in real estate. An unknown amount was deposited in bank accounts in other parts of the world.

The fortunes of the economic elite were built during the twentieth century and had a certain degree of state sponsorship or support. After World War II a new development strategy relied heavily on import substitution industrialization, for which the private sector was expected to produce more consumer goods. In exchange, the government began to provide a protectionist legal structure and economic support. Energy prices were kept low for industry. As a result, many people amassed fortunes in commerce and industry, and landownership—the old status symbol—declined in importance. A new urban-based oligarchy developed (see Growth and Structure of the Economy, ch. 3).

Kinship ties and intermarriage among the economic elite were also important. Single families (in their extended Latin American version) or clusters of families often held national or regional industrial and commercial monopolies. As Mexican anthropologist Larissa Lomnitz has pointed out, this was because many industrial concerns were initially family businesses that grew over generations while the family continued to control the firm. As a result of partnerships and marriage alliances over generations, the original families coalesced into multiple-firm industrial "groups." Group members sat on each other's boards of directors. Large and small business concerns were organized hierarchically, according to their relative importance. Within the "group," firms conducted business with one another.

An example of a contemporary industrial "group" was found in the Monterrey Group. Mexico's third largest city, the northeastern city of Monterrey, was one of Mexico's most industrialized areas, second only to Mexico City. Since the 1890s it has been dominated by the leading figure of the Garza Sada family. In 1895 Garza Sada and other wealthy citizens founded Cervecería Cuauhtémoc, which would become Mexico's largest brewery. His descendants consolidated and expanded the family business. They also diversified into glass, plastics, steel, petrochemicals, fibers, banking, insurance, and finance. During the 1970s the Garza Sadas represented Monterrey interests nationwide. They became known as the most important element of the Monterrey Group. Their economic power, managerial ideology, and industrial success made them natural spokesmen for an important sector of Mexico's businessmen. The Monterrey Group traditionally supported the conservative Party of National Action (Partido de

Acción Nacional—PAN) and criticized the PRI's "socialist" tendencies. In September 1973 the Monterrey Group's spokesman, Eugenio Garza Sada, then 82 years old, was ambushed and killed under mysterious circumstances that were never satisfactorily explained. During the 1980s his role was taken by Marcelo Sada, the director of Celulosa y Derivados, a chemical conglomerate that included Mexico's second largest chemical firm.

In 1977 Salvador Cordero and Rafael Santín, from El Colegio de México, identified 131 industrial "groups" nationwide. They referred to them as Mexico's new form of economic organization. They were fundamentally extended family groups in which relatives played important roles as administrators or employees in different family-controlled businesses or industries. Politically and economically, they represented all kinds of interests. Within the umbrella of the Monterrey Group, for example, it was possible to find different industrial "groups," such as the Visa Group and the Alfa Group, each of which acted as a holding company that represented and protected the interests of a group of industrial conglomerates. Close relationships existed among these groups.

The second economic subgroup was composed of the rural-based large landowners. They were the owners of the northwestern agribusiness and stock-raising enterprises. Nearly 100 percent of their produce was exported to the United States in the 1970s and early 1980s. Some of these large landowners also had strong interests and investments in commerce, industry, and banking in northwestern Mexico (see The Rural Society, this ch.).

The political elite was a product of the Mexican Revolution and an expression of the authoritarian structure that included the president, the members of his cabinet, state governors, members of Congress, the directors of the state-owned corporations, and high-level party leaders. Usually there were career professionals who achieved senior positions within the ranks of the PRI. The political resources of this elite were measured by the number of dependent officials under an individual's control. For example, in a 1984 Mexican newspaper editorial, a cynical description of Mexican democracy was quoted in the following terms: "The Governor names the Municipal President [i.e., mayor]; the Governor is named by the President of the Republic; and he, in turn, is named by his predecessor" (see Authoritarian Politics and Political Competition, ch. 4).

Inclusion in the political elite depended largely on executive largess. Mexican political appointees were known as the president's men. The elite as such underwent a renovation every six years as a result of the implementation of the Revolutionary slogan: "Effective suffrage—No reelection."

The life-styles of the political elite received a great deal of attention from different sections of the population, and the issue of corruption commonly arose. For example, Mexican author Jesús Silva Herzog (father of President Miguel de la Madrid Hurtado's secretary of finance) once commented: "Politics demotes and corrupts everything. The politician rarely is considered honest. He is only interested in his personal benefit. He is the beneficiary of the Revolution. . . . Politics is the simplest and most profitable of Mexico's professions." Silva Herzog's philosophical remarks were supported by Brandenburg's research, which concluded that the average senior Mexican government functionary finished his term with two or three houses, two or three automobiles, a ranch, and the equivalent of US$100,000 in cash and that about 25 senior government officials held posts from which they could leave office with 50 times that amount of cash. Through his moral renovation policies, however, de la Madrid committed himself to solving this old national problem.

The relations between the economic and the political elites were traditionally described as being of mutual and beneficial cooperation. However, they did occasionally experience short periods of sharp conflict. This may have been because since the early days of the Revolution, two conflicting tendencies could be found within the political elites in their dealings with the economic elite. On the one hand were those who favored a large role for the government in the national economy, and on the other hand were those who believed in a more limited role for the state in the national economy.

During periods of political stress or economic crisis, presidents tended either to criticize the economic oligarchy or to expropriate their investments. During their final months in office both presidents Luis Echeverría Álvarez and José López Portillo y Pacheco followed these patterns. Echeverría expropriated thousands of highly productive and irrigated land parcels and distributed them to landless peasants. López Portillo nationalized all private commercial banks and implemented a comprehensive system of exchange controls. In both situations some members of the private sector aligned themselves against presidential policies and even suggested that a coup d'état might be appropriate. However, peace returned on December 1, when the *sexenio* (six-year term of office) ended and a new president took the oath of office (see Business Groups, ch. 4).

The Rural Society

One of the major goals of the Mexican Revolution has been the equitable redistribution of land among rural dwellers. This was accomplished by dividing the huge haciendas and other large landholdings *(latifundia)* that had begun to grow and consolidate during the nineteenth century (see The Reform and the French Intervention; The Restoration, ch. 1). As Gerardo Gil Valdivia of the National Autonomous University of Mexico (Universidad Nacional Autónoma de México—UNAM) has commented, in the years immediately before the Revolution, 96 percent of the heads of rural families did not possess land, although 1 percent of the population owned 97 percent of the land. So it is no surprise that one of the longest and most detailed articles of the Constitution of 1917 was Article 27, which regulates landownership and water rights.

After more than 70 years of agrarian reform, Mexico had not yet solved its major land tenure problems (see Land Tenure, ch. 3). In 1984 about one-half of the land was in a vague legal status with no clear ownership titles. Large commercial units of agriculturally productive land were formed at the expense of small peasant and cooperative units. In contrast with the spirit of the Constitution of 1917, capitalistic relations of production were increasingly extended throughout the agricultural sector, particularly as a result of national and foreign capital investments in commercial agriculture and cattle raising. Major imbalances in land distribution continued to exist.

Land reform in Mexico has differed from other Latin American programs in concept. Unlike land reform programs in other Latin American nations, Mexico's was intended to restore the land to the peasant communities that had lost it as a result of the liberal agrarian legislation of the 1850s. Therefore, expropriated estate owners generally did not receive any compensation for their land, nor were the beneficiaries required to pay for the assets received.

The Mexican government never intended to destroy completely all its great haciendas. Particularly after the late 1940s, agricultural policy continually stressed productivity rather than social equity. Rural poverty, landlessness, malnutrition, and illiteracy continued to be a common feature in the countryside.

Data on land distribution and on the average size of landholdings varied greatly from one source to another. All sources pointed out, however, that rural Mexico's land structure was highly uneven. One source indicated, on the one hand, that 18 percent of the agricultural units were private farms under five hectares and composed only 0.7 percent of the total agricultural land in 1970. On the other hand, 3.7 percent of the holdings were more than 1,000 hectares and covered 3.2 percent of the nation's agricultural land.

Another factor was the insufficient quantity of agricultural land. Climate and soil conditions defined most of Mexico either as a desert (mostly in the north) or as a tropical or subtropical area (mostly in the south) (see Topography and Drainage, this ch.). Almost all productive land was already under cultivation by the early 1980s; little additional land was left to be reclaimed, and expropriation of the northern haciendas that remained would be too costly politically.

The rural class structure in the 1980s was much more heterogeneous than that which the authors of the Constitution of 1917 had envisioned. There were vast differences in wealth, culture, and political awareness among rural dwellers. As a result of the economic crises of the mid-1970s and early 1980s, there was a sharp increase in the inequality of income within the rural population. There was also a broad range within each particular class.

Rural Mexico continued to be a classical example of the ineffectual position in the political process of large numbers of unaware, unorganized, and politically unintegrated people in competition with much smaller but strategically placed interest groups. During the 1960s and 1970s peasants were seeking more land, irrigation, infrastructure, technical assistance, and credit for production, but their demands were met only in the few cases that involved better organized and more visible peasant groups. The relatively small number of powerful agricultural entrepreneurs, who owned large-scale modern commercial and export-oriented agricultural enclaves, however, benefited from the government's disproportionate allocations in the form of subsidies, credits, irrigation projects, and other inputs of infrastructure. Moreover, the economic crisis of the early 1980s further reduced the peasants' living standards and real income, forcing a growing proportion of them to seek paid employment on large rural estates or to migrate to cities.

Ejidatarios

Ejidatarios were the collective owners of an *ejido* (see Glossary), that is, a tract of land held in common by the inhabitants of a peasant community that could be farmed either cooperatively or individually. An *ejido*, according to Mexican legislation, is a legal entity of the "social interest sector" (as opposed to either the public or the private sector), and its jurisdiction is in the hands of Mexican-born peasants. Its holdings consisted of the *ejidal* plots, i.e., individual farming plots, the school plots, the *ejidal* urban zones, the houses and annexes to each plot, and the water resources and forest areas, when applicable. The land and its resources were granted free of charge by the government to a peasant community in a form of property that was inalienable, nontransferable, and nonattachable. Therefore, *ejidal* lands could not be used as collateral when applying for loans, nor could they be confiscated by legal processes. *Ejidos* must, according to law, be personally worked by *ejidatarios*.

Ejidos became the cornerstone of the new system of land tenure advocated by the Revolution as a result of the bloody struggle for land reform. Mexican historian Moisés González Navarro pointed out that the decree of January 6, 1915, that established the *ejido* specified that the measure was designed to alleviate the problem of the Indians' inability to adapt to the concept of private property, rather than to reconstruct the old Indian community for its own sake. Article 27 of the Constitution of 1917 confirmed the right that rural villages had over their neighboring land. Subsequent legislation rigidly regulated the rights and duties of the *ejidatario*. For example, during the late 1970s the government enacted a new law of agricultural and livestock development that for the first time authorized *ejidos* to be associated with land owned by neighboring agricultural estates. As a result, *ejidal* lands were no longer inviolate from outside incursion. *Ejidatarios* were usually unsophisticated peasants who lacked the political or administrative skills needed to understand the complexity of agrarian legislation or to lobby for the enforcement of their constitutional rights.

In 1970 some sources suggested that Mexico had 2 million *ejidatarios*, who, together with their dependents, represented 69 percent of the rural population. They worked an area of more than 60.7 million hectares, that is, 46 percent of the national farmland. The average size of an *ejido* was 30.6 hectares. However, as sociologist Rodolfo Stavenhagen pointed out, using 1960 data, the *ejido* sector was extraordinarily heterogeneous; although the average plot had only 6.5 hectares of arable land, 44 percent of all *ejidal* plots were less than four hectares, 41 percent were between four and 10 hectares, while 15 percent were more than 10 hectares.

Economist Schlomo Eckstein distinguished between two basic kinds of *ejidos:* the "individual" *ejido*, where land tenure and ownership were legally vested in a community but where cropland was allocated on a semipermanent basis among the individual *ejidatarios*, and the "collective" *ejido*, in which land resources were pooled for collectively organized production. During the early 1970s 95 percent of all *ejidos* were of the individual kind.

In the 1970s Stavenhagen and other scholars suggested that the *ejidatarios* were among Mexico's poorest and most exploited rural workers. Their productivity was low because of the poor quality of their land, the lack of timely technical assistance, and the unavailability of low-cost agricultural inputs. Yet the government's official policy has historically been to keep agricultural prices low in an effort to subsidize the urban population. As a result, many *ejidatarios* had to work for cash on nearby farms. This dynamic was magnified by the economic crisis of the late 1970s and early 1980s.

Ejidatarios were highly dependent on the bureaucratic channels of both the state and the PRI. All *ejidatarios* were automatically nominal members of the peasant sector of the PRI; but owing to their lack of political experience, they were easily manipulated by Mexico City-based professional "peasant" leaders, who were usually of middle-class backgrounds (see Institutional Revolutionary Party, ch. 4). In fact, *ejidatarios* were at the bottom of a double hierarchy—that of the state and that of the PRI—which put them in a subordinate position to the political and economic interests of each. As a result, many *ejidatarios* looked to the state as a modern *patrón* (traditional paternalistic landlord) who had the power to control prices, credit opportunities, and access to farm machinery and water rights and who had to be continuously courted and reminded of their pressing needs.

It seemed clear that the original intent of the *ejido* system—to make land available on an equitable and democratic basis—had not been realized. Instead of controlling their own resources, the *ejidatarios* were relatively powerless and unable to protect their interests fully through political channels on an equal basis.

Minifundistas

Minifundistas (from the Latin *mini*, small, and *fundus*, a plot of land with its buildings) were private landholders who worked agricultural units that were too small to satisfy the basic needs of an average peasant family. These units varied in size, price, quality of land, availability of water, topography and, of course, value.

In general, however, *minifundistas* could be considered as a majority of the owners of private land of less than five hectares. In 1970 some 18 percent of the owners of private farms could be classified as *minifundistas*. They owned 0.7 percent of the agricultural land, and the average size of their plots was only 1.7 hectares.

Traditional subsistence farming, practiced by most *minifundistas*, relied heavily on the cultivation of maize, beans, and squash. It also included a variety of plants from the agave family, such as maguey agave and henequen agave, from which the alcoholic beverages pulque and tequila were made and from which a sisal-like fiber was extracted.

Minifundistas were not generally politically organized; their lack of political power was attributable to their dispersion and isolation and their dependence on a rural bourgeoisie to whom they sold their agricultural surplus and from whom they bought needed goods and services. They were also commonly subordinate to local caciques (strongmen), who were influential in the political or administrative affairs of their town or district.

Minifundistas usually engaged in various activities, both within and outside their district, to supplement their low income levels. The most common among these were seasonal employment as wage laborers on the nearby farms or as far north as the United States; the production of crafts, such as pottery and weaving; fishing; wage labor in mines or in road construction; domestic service in nearby towns or cities; or petty trade in local markets.

Owners of Family and Medium-Sized Farms

Family farms, according to Stavenhagen's categorization, were privately owned agricultural units between five and 25 hectares in size that were neither particularly prosperous nor highly productive but that could provide full employment opportunities to the proprietor and his family. Some 7.8 percent of all heads of farm units, 3.6 percent of the agricultural labor force, and 17 percent of all private landholdings fell into this category in 1960.

These farmers were more financially secure than the *minifundistas*. On occasion they hired wage labor or rented agricultural machinery at some stage of the agricultural process. As owners of their land, they could also apply for credit, with considerably more success than a *minifundista*, at financial institutions (such as the government-owned National Bank of Rural Credit) by using their land as collateral.

Medium-sized farm units were characterized by their notably greater productivity and by a permanent demand for wage labor. Relying heavily on farm machinery, their owners usually cultivated such market-oriented crops as sugarcane, coffee, bananas, and cereals—such as corn, wheat, barley, and sorghum—or raised livestock. Stavenhagen found in 1960 that there were 170,000 landholdings of 25 to 200 hectares, which represented 13 percent of all privately owned farm units and occupied 10 percent of all privately owned land.

Large Landowners

This category included the owners of highly productive rural properties of more than 200 hectares that were usually situated in the most fertile and productive areas of the country. Most of the country's irrigated properties were also held by large landowners. These holdings operated according to entrepreneurial criteria and could be characterized as modern, oligopolistic, agroindustrial, and agribusiness complexes that made intensive use of modern agricultural and animal husbandry technology. Their production was usually marketed for an urban national and international clientele.

Latifundistas (large landowners) were entrepreneurs well aware of national political and economic affairs. Politically, they were organized within the National Federation of Small Farm Properties and the National Harvesters' Association, both of which were part of the popular sector of the ruling PRI. They were also closely linked with the national economic elite and had diversified their investments into fields such as commerce, credit, transport, real estate, and service activities.

In 1960 *latifundistas* owned 42,000 rural estates (3 percent of all properties) having a total area of 86 million hectares, or 84 percent of all land owned by the private sector. Eighteen years later the World Bank found that 10,000 *latifundistas* owned 41.8 million hectares in farms, each with an area of more than 1,000 hectares, or 32 percent of all land owned by the private sector in 1978. Although any estate of more than 100 hectares of irrigated land or its equivalent could be legally expropriated by the government under Article 27 of the Constitution of 1917, the Mexican government was reluctant to expropriate the remaining large estates, not only because of the high political cost of this measure—it would trigger an open confrontation with the powerful popular sector of the PRI—but also because of a fear of reducing agricultural productivity.

The post-World War II expansion of agribusiness into the northwestern states of Sonora and Sinaloa sped the development of modern agriculture. Thousands of hectares of rich irrigated land were devoted to the cultivation of winter vegetables, such as tomatoes, cucumbers, and peppers, for markets in the United States. These exports occupied an important place in the Mexican economy (see Agriculture; Foreign Trade, ch. 3). In order to increase their agricultural yield, *latifundistas* made intensive use of expensive and sophisticated modern technology. This included the use of hybrid seeds, the building and upkeep of irrigation ditches, the use of various kinds of farm machinery, and the intensive use of chemicals, such as fertilizers, herbicides, and insecticides.

The side effects of this concentration of land resources were dramatic. In the state of Sinaloa, for example, 85 *latifundistas* controlled (not necessarily owned) 117,000 hectares of irrigated land and produced over two-thirds of Mexico's winter crop exports in 1976. Modernization and mechanization of the fields, however, signified an increasing displacement of year-round farm workers. They were replaced by seasonal labor, whom companies came to employ—along with their families—on a piecemeal basis. These landless peasants worked long hours and were lodged in rustic temporary shacks built near the fields.

The Landless Rural Worker

The poorest and usually the most economically exploited rural group in Mexico were the landless rural dwellers. Estimates of their numbers varied. Stavenhagen counted about 1.3 million rural landless families in the country in 1960. Ten years later other sources estimated that 44 percent of the rural families were landless, having not yet benefited from land reform. In 1975 it was disclosed that more than 3 million peasants had applied and been found eligible for *ejidal* grants but that no lands were being made available for new *ejidos* by the government. The increasing scarcity of cultivable lands made it unlikely that the fate of the landless rural worker would ever improve. Moreover, considering the high population growth rates and the fact that the urban economic sectors of the economy were unable to absorb new entrants into the labor market, it was unlikely that these landless rural workers would soon be absorbed into the national labor force.

The landless rural worker was part of a highly heterogeneous category, ranging from those who held relatively well-paid permanent jobs in the capitalistic, export agricultural enterprises in the northwest to unemployed and marginally employed day laborers engaged in seasonal farming in the poor southern states. Migrant workers represented an important subcategory among the landless rural workers. In 1970 the cultivation of four major commercial crops alone—cotton, coffee, tobacco, and sugar—employed more than 600,000 migrant workers. It was reported that nearly 70 percent of these workers, along with their families, were migrating during at least seven months a year. Most moved from harvest to harvest in order to maximize their employment opportunities. They tended to follow similar patterns year after year, working for the same employers.

Employers, however, did not provide room and board for their migrant workers. They were expected to build their own temporary shelters and cooking facilities in areas near the fields. The management's commitment was limited to paying a salary to the migrant worker; no social services or facilities were provided.

Wage levels varied nationwide, according to the type of work involved. In 1983, for example, the legal minimum daily wage for rural workers ranged from the equivalent of US$2.20 to US$3.50. This minimum wage was not fully enforced; many workers were paid much less.

The Guatemalan Indian Refugees

During the 1960s and 1970s it was common for many Guatemalan Indians to migrate temporarily to the southern Mexican state of Chiapas in search of work on large coffee *fincas* (plantations). Salaries were somewhat higher than those found in rural Guatemala. The Mexican government authorized the procedure by granting these economic migrants a legal status that authorized them to work by picking produce in an area within 80 kilometers of the border for a period of 90 days.

This situation began to change dramatically in 1980, when the government of Guatemala intensified its campaign against leftist guerrillas from the peasant communities of the northern departments of Huehuetenango, Petén, and Quiché. Authoritative sources suggest that thousands of Guatemalan Indians suspected of supporting the insurgents were subsequently killed in their villages. Many who survived sought sanctuary across the border in Chiapas.

In early 1984 about 46,000 Guatemalan Indian refugees lived in 87 government-created refugee camps located a few miles north of the border. These camps were administered by the Mexican Commission for Aid to the Refugees and were funded by the United Nations High Commissioner for Refugees. The Catholic church, through its diocese in San Cristóbal de las Casas, Chiapas, also provided substantial aid for the refugees. An additional 50,000 to 60,000 "clandestine refugees" were not accounted for by the government authorities and were thought to be living in the neighboring border areas of Tapachula, Comitán, or in the valleys of the Río Lacantún and Río Usumacinta.

Guatemalan refugees were mostly Indians who migrated from very poor rural areas. Many did not speak Spanish, and a majority were afflicted by health problems caused by severe malnutrition. By 1984 most of the refugees lacked any kind of permanent immigration status. But the Mexican government, following a tradition of providing sanctuary to foreign political dissidents, was reluctant to deport Guatemalan refugees. It was also reluctant to accept more refugees, however. In 1984 the situation was reported to be causing strains between the Secretariat of Government and the Secretariat of Foreign Relations and also between the armed forces and the Catholic hierarchy (see National Security Concerns for Mexico, ch. 5).

In mid-1984 the Mexican government decided to relocate all Guatemalan refugees living in the government-created camps in Chiapas to new camps established by the government in the state of Campeche. The first of these new camps, Kanasayab, was in an area selected by the government because there were no Mexican farmers working the land nearby. Surrounded by thick vegetation, the refugees were expected to work the area and make a living from its land.

Interpersonal Relations

Interpersonal relations were more important in the functioning of Mexican society than impersonal, bureaucratic norms and regulations. The *parentela* family members, *compadres* (godparents), *cuates* (very close buddies), and friends expected from one another various degrees of loyalty, material and spiritual assistance, emotional support, physical protection, and even flexibility in the enforcement of laws, norms, and regulations.

The nuclear and bilateral family unit was the ideal and most common residential arrangement throughout Mexico. Primary ties were structured through blood descent, which was traced equally through the father's and mother's side. Every person was, therefore, a member of two family lines. The person's name, which often included the matrilineal after the patrilineal, represented this arrangement.

One's *parentela* usually included all the descendants of a great-grandparent or of a grandparent on both the father's and the mother's side. Thus, it was fairly common for a person to claim having a dozen or more "uncles" and "aunts" and several dozen cousins. However, this same person would easily identify the several degrees of the specific type of relationships that existed within the family.

The Mexican household, that is, those family members who dwelled under the same roof, differed from the North American household. Mexican households could include the parent's nuclear family as well as that of a married son or daughter and their young children. Living arrangements varied among the different kinds of households. In most cases in which two or more nuclear families shared the same roof, each nuclear family kept its separate budget and, often, a separate kitchen. After a few years of living with their parents, married children who opted for this arrangement often set up an independent household. Other household members could include out-of-town relatives, fellow townsmen, and *arrimados* (literally "the leaned-on," that is, renters or "permanent guests").

Family membership presupposed an inalienable bond among first, second, third, and fourth generation relatives, a bond that is accompanied by a corresponding set of rights and obligations. Family members were expected to display openly and reciprocally the fraternal virtues of affection and material and moral support. Furthermore, the traditional family had the power to enforce these virtues through the exercise of pressure over its members and through a series of actions usually performed by its elder members. These included social pressure, manipulation, and gossip.

Compadrazgo (godparenthood) played a very important role throughout the Mexican social structure. Through this religious institution personal friends were chosen and incorporated into one's family for the purposes of ritual sponsorship of one or more of the family's children or its material possessions.

Two different sets of permanent spiritual ties were formed through *compadrazgo*. The first linked the *compadre* with the godchild or the material possession. The second built a tie between the *compadres* and either the natural parents or the owners of the personal property. It was the second set of ties that was especially important throughout the Mexican social system. It linked members of the same social class as well as persons belonging to different social classes.

The circumstances under which *compadrazgo* ties were built and religiously sanctioned varied throughout Mexico. For example, Lomnitz found that the residents of Mexico City's shantytown of Cerrada del Cóndor had developed 18 different occasions in which *compadrazgo* ties were formed. Nationwide, the most common of these were associatd with the Catholic sacraments of baptism, confirmation, first communion, and marriage. However, other kinds of *compadrazgo* were established through the inauguration of a house, office, workshop, or motor vehicle or even the celebration of the graduation of a family member or the first cutting of a child's hair.

Ideally, *compadrazgo* was conceived as a relation of equality that provided its bearers with an assumed tie of intimacy. *Compadres* expected unquestioned loyalty, trust, affection, respect, and mutual assistance. The seriousness of the link, as well as its permanence throughout life, varied according to the motives by which the link was established. Those ties built as a result of a Catholic sacrament were more permanent than those built by making use of such pretexts as the first haircutting or the ritual sponsorship of a new motor vehicle.

A third structural element by which "permanent" social relations were built was through *cuatismo* and comparable associations of women. *Cuate* (from the Nahuatl Indian language word meaning twin brother) was used throughout Mexico to describe a special male friend or group of friends with whom one would pass considerable leisure time and who could be entrusted with intimate information. *Cuate* groups could include up to 10 members who shared common interests, who were bound by intense friendship and personal relations, and who committed themselves to assisting each other in case of need.

In the early 1960s Professor George M. Foster of the University of California at Berkeley concluded that reciprocity was the basis of Mexican social relations and that a "dyadic contract" model was the best analytical tool to understand the Mexican social system. The model postulates an informal structure in which the most significant ties within institutions were selective and achieved rather than ascribed and that the formal institutions of society provided every individual with a large group of candidates with whom to interact. Each individual—through the dyadic contract mechanism—selected only a few individuals with whom he developed significant working relations. These dyadic ties were informal or implicit, lacked ritual or legal validation, and were unenforceable through any kind of authority.

Foster recognized two basic kinds of dyadic ties, depending on the status of the participants. "Patron-client" contracts were "vertical," tying people of different socioeconomic status, who exchanged different kinds of goods and services, to one another or to the saints. "Colleague" contracts, in contrast, were "horizontal," tying together people of equal or approximately equal socioeconomic position, who exchanged relatively similar kinds of goods and services.

Social relations and the manipulation of the social environment through the effective use of these dyadic ties took priority in all kinds of interpersonal relations within and outside the family. The basic principle that underlay social relations was one of reciprocal exchanges between partners, whereby an individual throughout his life built a personal network in order to acquire the personal support he or she might need under any circumstances. Furthermore, a rewarding life entailed the ability to make use of all these horizontal and vertical ties—including those built up with saints—to the best advantage.

Forces of Change: Three Development Experiences

Mexico City's Metropolitan Area

Metropolitan Mexico City, its population estimated at between 15 and 17 million in 1984, was—along with Tokyo-Yokohama and New York City—among the world's three largest cities. Situated in the center of the Valley of Mexico at an altitude of 2,238 meters, it is also among the world's highest capital cities. The capital occupies the same site as its pre-Hispanic predecessor, Tenochtitlán, which was founded by the Aztecs in the early fourteenth century on the marshlands of the salty Lago de Texcoco and has therefore been continuously occupied for more than 650 years. Surrounded by mountains rising 1,000 meters and higher, its topographical configuration severely restricts air circulation and was responsible for the heavy smog that often blanketed Mexico City in the early 1980s (see The Aztecs, ch. 1).

The downtown areas of Mexico City lie on what was the bed of Lago de Texcoco. Thus, in many sections of the city it is extremely wet, and pumping water out of the subsoil has caused the city to sink as much as nine meters during the twentieth century. The sinking has not been uniform, however. For example, the Palace of Fine Arts has sunk nearly three meters in less than a century; the old and now closed Basilica of Our Lady of Guadalupe tilts forward and sideways at a severe angle.

The population growth of the nation's capital has been impressive. In the year 1900 Mexico City had a population of 345,000 inhabitants, and by the 1930s the city had passed the 1 million mark. In 1970 Mexico City had 8.8 million inhabitants. Then, between 1970 and 1984 its population almost doubled.

As a result of this tremendous population growth, Mexico City has been continuously expanding its borders from the 12 *cuarteles* (its old political-administrative units) in the nineteenth century urban area of the Federal District to the mid-1980s megalopolis that included the 16 *delegaciones* (modern units) of the Federal District, plus some neighboring *municipios* in the state of México. In the mid-1980s the city covered an area of more than 1,000 square kilometers—550 square kilometers within the Federal District and the rest in the state of México. At that time an estimated 20.2 percent of the national population lived in an estimated 0.05 percent of the national territory.

Demographer Luis Unikel of El Colegio de México has suggested that Mexico City's population growth and geographical expansion could be divided into three periods. Before 1930, in the first period, 98 percent of the city's population lived within the boundaries of the 12 old *cuarteles*, and only 2 percent lived in the suburban Federal District. The *cuarteles* then had an annual growth rate of 3.3 percent, compared with the Federal District's 2.6 percent. During the second period—1930 to 1950—the city as a whole grew at a much faster rate and expanded over the entire area of the Federal District. Annual growth rates began to increase very fast. For example, during the 1940s the old downtown *cuarteles* experienced a 4.3-percent annual growth rate, while some *delegaciones* grew at 10.3 percent annually.

During the years 1950 to 1970 the city continued to expand and began to cover areas within the state of México. Population growth almost halted in the downtown *cuarteles* (0.3 percent annual growth during the 1960s) and increased at unbelievable levels in some *municipios* of the state of México. For example, Patricia M. Rowe of the United States Bureau of the Census has suggested that during the 1960s the *municipio* of Netzahualcoyotl, just east of the boundary with the Federal District, grew at an average annual rate of 54.2 percent. Netzahualcoyotl's population of 60,000 in 1960 grew to 580,436 in 1970 and 2.3 million in 1981.

A reflection of Mexico City's centralism and preeminence was the tremendous average annual growth rate experienced during the 1950s and 1960s in the neighboring urban areas of the state of México, which grew at an average annual rate of 18.2 percent during the 1950s and 15.1 percent in the subsequent decade. During the 1970s these rates began to fall as a result of new government population policies. However, during the mid-1980s metropolitan Mexico City, especially its working-class neighborhoods, grew—in large part because of in-migration—far faster than city planners were able to provide shelter and services (see Population, this ch.).

As a result of demographic growth, Mexico City absorbed many suburban and agricultural areas that lacked basic urban infrastructure and services. Owing to inadequate zoning controls, residential areas have mushroomed in agricultural, commercial, and industrial regions. The city has also witnessed the sudden proliferation and expansion of hundreds of so-called *colonias populares* (people's neighborhoods or squatter settlements). There, homeless dwellers, locally known as *paracaidistas* (literally, parachutists), would discover an empty tract of land and hastily build shacks with any kind of discarded material. Often, *colonias populares* literally grew overnight from an empty field into a population of several dozen families or more.

The magnitude of Mexico City's housing problem could be illustrated by some 1984 statistical information. Some sources conservatively estimated that 6 million people (38 percent of the city's population) lived in the city's slums *(vecindades),* shantytowns *(ciudades perdidas;* literally, lost cities), and *colonias populares*. It was also reported that 50 percent of the city's houses had been personally built by their occupants and that 40 percent of the total number of houses lacked sewage facilities. Fully 26 percent of the city's families, averaging five members each, lived in one-room houses.

A classic example of these *colonias populares* could be found in the *municipio* of Nacaulpán in the state of México. In 1950 Nacaulpán had a population of 30,000 inhabitants. It grew to 408,000 inhabitants by 1970, and by the early 1980s it had surpassed the 1 million figure. However, the area had not yet been properly subdivided or provided with standard urban services and facilities, such as piped water, electricity, sewage disposal, paved roads, schools, or hospitals.

Mexico City attracted an important share of the national population because of its preeminence as the nation's most important political, industrial, and financial center. Because of the monolithic and centralized structure of the Mexican political system, all major government decisions were made in Mexico City. Therefore, the city housed 1.5 million bureaucrats, representing two-thirds of the federal government bureaucracy. The largest financial institutions, the best educational institutions, and the most efficient medical facilities were also found in this city. For example, in 1984 it was estimated that Mexico City's educational facilities trained two-thirds of the nation's students and that its financial institutions handled seven out of 10 bank transactions.

Mexico City's metropolitan area was also home to more than 50 percent of the nation's industry. In 1984 almost one-third of all the nation's factory and commercial jobs were located in Mexico City.

In order to obtain a better understanding of the socioeconomic preeminence of Mexico City's metropolitan area, Unikel and his team of demographers undertook an analysis of what they called Mexico City's urban subsystem. This subsystem consisted of the city's neighboring areas that had continuous direct interrelationships and a high integration potential in terms of industrial complementarity. Based on an analysis of daily vehicular traffic to and from Mexico City, they determined that during the 1960s the city's subsystem included the nearby cities of Toluca, Puebla, Cuernavaca, Querétaro, and Pachuca.

According to government figures, in 1980 at least 41.6 percent of Mexico's gross national product (GNP—see Glossary) was found to be generated in the six states where these urban areas were located. Among these, there was a clear preeminence in the contribution of the Federal District (25.1 percent) and that of the state of México (9.8 percent).

The Mexican government has been well aware of the problems derived from overpopulation and industrial concentration in the nation's capital. Since the 1960s some five decentralization programs have been proposed. During the early 1980s some bureaucratic measures began to be adopted, especially in the fields of health and education. Their success will depend on the successful promotion of development in regions distant from Mexico City.

The Northern Border Region

Mexico's border area with the United States along the 3,326-kilometer frontier included 35 *municipios* located in the states of Baja California Norte, Sonora, Chihuahua, Coahuila, Nuevo León, and Tamaulipas. In 1982 the total projected population of these border states was 11.4 million, or 15.6 percent of the national population. Working with the 1970 census figures, Víctor L. Urquidi and Sofía Méndez Villareal, both of El Colegio de México, estimated that in 1978 the total population of these border states was about 8 million inhabitants (17 percent of the national population), of which 2.3 million were found in the border *municipios*. They also found that 75.6 percent of the border region's population was concentrated in seven municipalies: Ciudad Juárez, Mexicali, Tijuana, Ensenada, Matamoros, Nuevo Laredo, and Reynosa, each of which had populations that exceeded 100,000 in 1970.

During the decade following 1970 the population growth rate and the urban sprawl of the northern border cities was significant. Among these, special reference should be made to Tijuana and Mexicali, both in the state of Baja California Norte; Nogales in the state of Sonora; Ciudad Juárez in the state of Chihuahua; Piedras Negras in the state of Coahuila; and Nuevo Laredo, Reynosa, and Matamoros in the northeastern Gulf state of Tamaulipas. These eight urban centers have had a very fast population growth rate that from 1944 to 1984 was close to 5 percent per year.

Ciudad Juárez, near El Paso, Texas, was the largest Mexican border city; its 1940 population of 48,881 inhabitants grew to 695,445 by 1980. The population of Tijuana, next to San Ysidro-San Diego, California, grew from 16,486 in 1940 to 683,493 in 1980. Finally, Mexicali, bordering on Calexico, California, grew from 18,775 in 1940 to 441,520 in 1980. These three border cities alone had a 1980 population of 1.8 million, accounting for 19.4 percent of the total population of the six border states in that year.

The Center for Economic and Demographic Studies of El Colegio de México projected the population of the most important border cities for the year 1990. By that year Ciudad Juárez was projected to reach 1,116,000; Tijuana, 965,000; Mexicali, 841,000; Nuevo Laredo, 490,000; Matamoros, 464,000; Reynosa, 404,000; and Ensenada, 229,000. Most of this population growth will be a result of immigration from other areas.

Migration from the rural areas of the states of Jalisco, Durango, Zacatecas, Nuevo León, and Sinaloa was the most important factor in the population growth of the northern border *municipios*. The prospect of higher wages, better living conditions, and the proximity of the United States attracted migrants, most of whom were impoverished rural dwellers, to these areas. This trend began to intensify in the 1940s, when there was a high demand for unskilled Mexican labor in the United States southwest.

The role of the Mexican border cities in south-to-north Mexican internal migration was controversial. According to some authors, these cities were the terminal points for the migratory routes that began in the congested cities and impoverished villages of central Mexico. For others, however, the border cities were migrant towns—stopover places that constituted an important step in the migratory process (legal and illegal) to the United States. In fact, both situations occurred simultaneously. Consequently, many people migrated to these cities with the prospect of obtaining jobs in budding industries on the Mexican side of the border; however, others moved there as a first step in their migration to the United States. It was for this reason that Douglas Butterworth of the University of Illinois and John K. Chance of the University of Denver preferred to refer to these urban border areas as temporary asylums for Mexicans seeking admission to the United States.

Jorge A. Bustamante of El Colegio de México has said that among those who crossed the border frequently, usually on a daily basis, one may distinguish among several groups. First were those who held a so-called green card, and thus enjoyed United States resident alien status and were authorized to live and work indefinitely on the northern side of the border. In 1976 the United States Immigration and Naturalization Service identified 46,000 green card holders who lived on the Mexican side of the border and commuted daily to work on the United States side. Second were those with a nonresident alien Mexican border crossing card, which allowed 72-hour shopping, recreation, and/or visiting trips and was valid for four years but did not authorize its holder to work in the United States. These cardholders were usually referred to as the "commuters." Third were the United States citizens who resided on the Mexican side of the border and worked in the United States. Finally, there were those who lived on the Mexican side of the border and crossed back and forth to work illegally in the United States. Bustamante pointed out that every day thousands of Mexicans and Americans in these four categories crossed the border either for work or for leisure, that many returned every night to their Mexican border-city homes, but that some used the opportunity to head north, with or without legal documentation, into the United States.

The fact that all Mexican border-cities were part of a twin border-city complex with a corresponding city in the United States played a crucial role in the sociology of the borderlands. For many purposes these urban complexes could be considered as a single city separated only by an international border. Every day there was a continuous flow of ideas, goods, services, and people in both directions. The estimated number of people who crossed the border throughout any year easily exceeded 100 million. As a result, local authorities, business executives, and community leaders periodically met to discuss relevant twin border-city projects and problems.

Poverty, unemployment and underemployment, and poor housing, as well as insufficient transportation, education, and other public services, were among the most common problems found in these twin border-cities. Throughout the twentieth century the Mexican government played different roles and had different attitudes toward its border towns. Since the 1960s special efforts have been made to refurbish the image of these cities, to resolve their chronic problems, and to transform them from their informal status of "pleasure towns" into flourishing industrial cities.

President Abelardo Rodríguez (1932–34) was often mentioned as being responsible for beginning to provide the northern border states with special economic privileges. A former governor of Baja California and a tourist-oriented casino owners, Rodríguez promoted the creation of a free-trade zone at the border during his brief administration. These privileges were to have ended in 1956. They were extended, however, until 1961, when the Mexican government launched its ambitious National Border Program, which was supplemented four years later by the Assembly Program, better known as the Border Industrialization Program.

The National Border Program was the Mexican government's first major response to the rapid population growth of its border communities and to their potential as a source of foreign currency earnings. Its basic objectives were import substitution, the promotion of tourism, and the improvement of the social and ecological environment of the border communities.

Launched in September 1965, the Border Industrialization Program was the Mexican government's response to the success of countries in East Asia in attracting multinational corporations that specialized in labor-intensive assembly and processing of items to be sold on the United States market. Since 1965 more than 585 of these plants—locally known as *maquiladoras* (see Glossary) and also known as in-bond industries or, pejoratively, as "runaway shops"—have been installed on the Mexican side of the border. In 1975 the total *maquiladora* investment in the Mexican border area was equivalent to US$64 million. Major industries included electronic/electric plants (55 percent of the investment), leather and footwear (12 percent), textiles (7 percent), sporting goods and toys (3 percent), wood products (2 percent), and food products (2 percent).

The availability of low-paid unskilled and semiskilled labor, the proximity of the international border, and the prospect of paying salaries in the rapidly devaluating Mexican currency were among the many factors that prompted several United States and multinational corporations to open assembly plants on the northern Mexican border. However, as María Patricia Fernández Kelley of the University of California has pointed out, the situation was not so idyllic. Although in the early 1980s these plants provided jobs for more than an estimated 100,000 Mexicans (85 percent of whom were women, largely between the ages of 18 and 35), between 1965 and 1980 unemployment in the border area rose by 83 percent. Men continued to find it very difficult to obtain jobs. Plants were unstable, often closing their operations on very short notice and moving abroad. Thus, job security was tenuous at best. Fringe benefits were kept to a minimum, and daily wages were low by United States standards. For example, in 1984 it was reported that the 22,000 employees in Matamoros' assembly plants earned an average wage equivalent to less than US$6 a day. Those who held similar jobs across the Río Bravo del Norte, in Brownsville, Texas, earned an average wage of more than US$30 a day.

The proximity of the United States and its huge economic resources have been commonly used to explain the sources of wealth in the border areas. Antonio Ugalde of the University of Texas at Austin points out, however, that there were other important sources of wealth independent of the *maquiladoras* that could be equally emphasized. Among these were the free-trade zone, the tourist trade, winter vegetable exports, the trade in smuggled goods in both directions and, in the specific case of Reynosa, the exploration of oil and gas resources.

The Southeastern Oil Region

The discovery of major oil deposits in the lowlands of the southeastern states of Chiapas and Tabasco during the late 1960s and early 1970s generated major demographic and economic changes in this previously economically depressed region. Before the oil boom these lowland areas were known mostly for their tropical forests, savannas, mangrove swamps, and saltwater lagoons. Their economies relied heavily on the proceeds of livestock raising (in the 1970s Tabasco cattle ranchers provided up to 30 percent of Mexico City's beef), on traditional agriculture, and on small-scale fishing. Villahermosa, the Tabasco state capital, was a small market center for cattle ranchers and the owners of tropical fruit plantations.

Oil exploration in the area began in 1958. The government-owned Mexican Petroleum Company (Petróleos Mexicanos—PEMEX) began exploring the coastal lagoons of the Río Tonalá basin and those of the Río Usumacinta. Oil was found, but few foresaw the fact that the area would contain one of the richest oil deposits in the world. Production began, and by 1960 the Tabasco oil fields produced 17.3 million barrels of oil and 3.3 billion cubic meters of gas. These represented 17.5 percent and 36.3 percent of the national oil and gas production, respectively. PEMEX also installed two separation plants—locally known as petrochemical plants—and built two "company towns": La Venta and Ciudad Pémex.

During the 1960s and 1970s PEMEX and its contractors intensified oil exploration in the region. Almost two dozen rich oil fields were discovered. The figures for proven oil reserves began to increase in geometric progression. The states of Chiapas and Tabasco, once seen as Mexico's Cinderellas, came to be viewed as antidotes for the nation's long-standing poverty (see Petroleum, ch. 3).

In order to maximize oil exploitation and minimize red tape, the Mexican government immediately enacted legislation declaring that oil exploration and oil production were to receive top national priority. In 1977 some sections of Article 27 of the Constitution of 1917 were amended. That amendment granted extraordinary powers to PEMEX in the pursuit of oil exploration and exploitation throughout the Mexican territory. New oil legislation, based on that amendment, was enacted and only required that PEMEX gain permission from the Secretariat of Patrimony and Industrial Development (the predecessor of the Secretariat of Energy, Mines, and Parastatal Industry) in order to explore for and produce oil. The secretariats of agriculture and of agrarian reform no longer required consultation. *Ejido* lands and private property subsequently could be expropriated. If problems of indemnification arose, settlements between PEMEX and landowners were to be reached through the Appraisal Commission of National Goods.

As a result, the Chiapas and Tabasco oil boom was considered by many as a mixed blessing for the region. The overall increase in the level of economic activity in the region's oil-producing areas resulted in major changes in the region's social, economic, and political structure. It was also accompanied by a number of unsettling effects on prices, income distribution, the availability of basic infrastructure, and air and water pollution.

The positive impact of the oil boom could be evaluated on the basis of investment and employment. For example, in 1973 the gross investment in the state of Tabasco was 2.2 billion pesos (for value of the peso—see Glossary); in 1977 it had increased to 8.6 billion pesos. PEMEX' regional investment grew from 421 million pesos in 1976 to 12.8 billion pesos in 1978. Thus, in two years the government oil company made a thirtyfold increase in regional investment.

Petroleum-related activities—from airborne seismic exploration to well-drilling, production, refinement, export, and related activities—although physically carried out in the tropical areas of the states of Chiapas and Tabasco, were planned in other areas, which also received the bulk of their benefits. PEMEX's entire decisionmaking process was carried out in Mexico City. Moreover, the oil proceeds have always been used by the federal government for the interest of the nation as a whole.

The millions of Mexican pesos suddenly invested in the region during the 1970s had an immediate effect on the otherwise stagnant regional economy. However, this investment only helped finance a modern capital-intensive venture in which there would be just an initial demand for labor for well-drilling, construction of camps and plants, and installation of pipelines. Once the system was fully built and began to operate at full capacity, PEMEX would reduce its personnel and require only a few people to work as supervisors or operators.

The oil boom facilitated the redistribution of the region's population. Many residents of northern Chiapas and Tabasco abandoned their fields to work in oil-related activities. The internal flow of people from rural to urban areas was dramatic. PEMEX's average salaries—three times the regional average—were the main attraction. Few people migrated from outside the area. As a result, during the 1970s the state of Tabasco experienced an average growth of 4 percent, only slightly higher than the 3.3-percent national growth rate.

Relations between the region's rural dwellers and PEMEX sometimes became severely strained. According to the proceedings of a Chiapas state legislature report on the Reforma petroleum area, oil exploration in the area brought all kinds of social, economic, and political problems. The sarcastic phrase, "Although PEMEX moves in, it doesn't pay off," in reference to its takeover of land, became popular throughout the region.

During the late 1970s and early 1980s in northern Chiapas, PEMEX expropriated more than 8,000 hectares of *ejido* and community lands and severely damaged 2,000 additional hectares. During that same period PEMEX built its Cactus-Reforma Separation Plant on 364 hectares of land that had previously belonged to two *ejidos*. According to the report of the state legislature, all those lands were appraised and bought at low prices. Paradoxically, by expropriating *ejido* lands under a loose interpretation of the recent amendments of Article 27 of the Constitution of 1917, PEMEX was overriding one of the most cherished achievements of the Mexican Revolution—the sacredness of *ejido* lands, which was guaranteed in another section of that same constitutional article.

Many social and ecological problems were caused by PEMEX' exploration and production activities in the area. For example, in 1979 alone, 2,700 grievances of various kinds were filed against PEMEX. Only 1,300 of these were accepted, costing PEMEX the equivalent of only US$482,403 in financial settlements. The objects of these grievances included land expropriation, air contamination, water pollution, soil contamination, poisoning animals, and killing fish in lakes and rivers.

Urban growth was another side effect of the oil boom. Urban centers located in the oil-producing areas unexpectedly found themselves growing at annual rates close to 10 percent. Rural migrants posed heavy burdens in terms of housing as well as on the already inadequate urban services and facilities. During the late 1970s, as a result of the construction of the Cactus-Reforma Separation Plant, for example, an *ejido* village had to house all of the new plant's workers. In addition, many agricultural plots became sites for temporary shacks because of the severe housing shortage.

During the 1970s and early 1980s the quality of life throughout the southeastern oil region deteriorated very quickly. Urban prices soared after food supplies and goods became scarce. The existing differences in regional income distribution became larger. The gap was wider when those working in the oil sector were compared with those engaged in traditional occupations. However, although oil workers were earning well above the regional average, their expenses were also high because of overpriced commodities.

The area's three largest and fastest growing cities were Villahermosa, Coatzacoalcos, and Minatitlán. Villahermosa, Tabasco's state capital, grew from a 1960 population of 52,262 to a 1985 projected population of 334,000. The twin cities of Coatzacoalcos and Minatitlán, 200 kilometers west of Villahermosa, each had a 1970 population of 70,000 inhabitants and a 1985 projected population of 182,000 and 190,000, respectively. Although smaller in size, other secondary cities—such as Cárdenas, Comalcalco, Cunduacán, Macuspana, and Paraíso, all in the state of Tabasco, and Reforma in the state of Chiapas—also experienced very rapid growth rates and severe urban problems.

Religion

Mexico was predominantly a Roman Catholic country, and 89.4 percent of its population declared that they professed that religion, according to the 1980 national census. Protestantism, representing 3.6 percent of the national population, ranked second. Judaism was third, constituting 0.1 percent. Members of other non-Christian religions, such as Bahais, Buddhists, Muslims, and adherents of Chinese religions, constituted 0.8 percent of the population. Other census categories included the nonreligious, having 2.9 percent, and those unspecified, having 3.2 percent.

The Catholic church's role in Mexican history goes back to 1519, when Hernán Cortés, the Spanish conqueror of New Spain, landed on the coast of Mexico, accompanied by Catholic clergy. All new Spanish territories were to be conquered in the name of the cross as well as the crown. Since those early days the Catholic church has always been present, playing different roles, some of which have led to violent confrontations (see The Conquest, ch. 1).

Early postindependence leaders symbolically recognized Mexico's Catholicism in the flag of the new nation. In the early 1820s, when future Mexican emperor Agustín de Iturbide chose the colors of the Mexican flag—red, white, and green—he selected white to symbolize Mexican Catholicism, green for independence from Spain, and red for the country's mestizo ethnicity. Since that time, however, the popular interpretation of the white color in the flag has changed to a representation of life.

The history of the relationship between church and state following independence was one of a series of efforts on the part of the government to curtail the church's previously high degree of influence. These efforts date from the nineteenth-century liberals, who, trained in the law and under the influence of the French Revolution, were federalist, anticlerical, and in favor of free competition. Liberals were highly concerned with the fact that the Catholic church, by owning between one-quarter and one-half of the land in Mexico and by controlling most schools, hospitals, and charitable institutions, was practically a state within the Mexican state (see The Reform and The French Intervention, ch. 1).

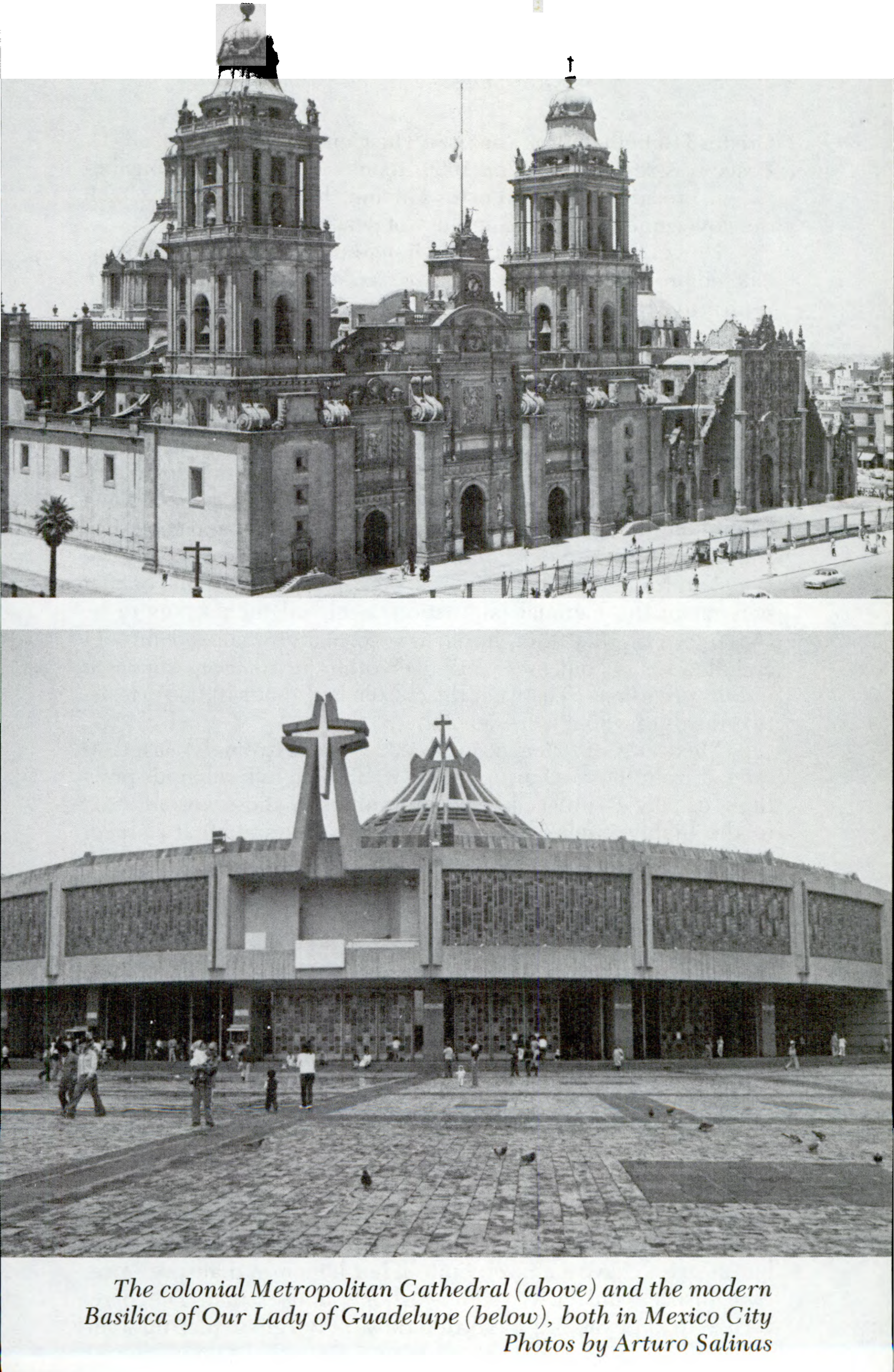
Between 1833 and the early 1940s the Mexican government produced different pieces of legislation to limit the power of the church. In 1833 the government adopted several measures, including the secularization of education and a declaration that the payment of the ecclesiastical tithe was not a civil obligation.

The first major confrontation between the church and the state occurred during the presidency of Benito Juárez. The 1855 Juárez Law drastically reduced traditional ecclesiastical privileges. On March 11, 1857, a new constitution was adopted that denied all ecclesiastical entities the right to own real estate and abolished most remaining ecclesiastical privileges. On July 12, 1857, Juárez confiscated all church properties, suppressed all religious orders, and empowered the state governors to designate all buildings that could be used for religious services. Mexico's first religious civil war was fought between 1857 and 1860 in reaction to the legislation.

The Constitution of 1917 highlighted and institutionalized many of the nineteenth-century secular reforms and paved the way for the second Mexican religious civil war: the Cristero Rebellion of 1926–29 (see The Constructive Phase, ch. 1). The new Constitution included at least five articles that affected all religious groups, regardless of denomination. These articles—Articles 3, 5, 24, 27, and 130—remained in effect during the mid-1980s but were not enforced after the 1940s.

According to Article 3, all religious groups are excluded from engaging in educational activities at the primary, secondary, and normal, i.e., teachers' college, levels, as well as educational activities for blue-collar workers and peasants. Article 5 prohibits the establishment of religious orders, regardless of their faith or purpose. Article 24 guarantees religious liberty and practice in temples or private dwellings but restricts all public religious acts to the interior of church buildings. Article 27 prohibits all religious groups, regardless of denomination, from owning real estate and declares all churches to be state property. Article 130, the longest and most detailed of the articles discussing religious issues, reiterates most of the nineteenth-century secular reforms. It states that Congress cannot support or prohibit the practice of any religion; that marriage is a civil contract; that the state does not acknowledge civil status to any church; that clergy are professionals subject to the same laws and regulations that affect all professionals; that state legislatures can determine the maximum number of clergy working within their state; that Mexican citizenship is required to become a minister; that clergy cannot publicly comment upon or criticize public laws or government officials, nor can they vote or participate in political organizations; that religious publications should abstain from discussing political issues; that the Secretariat of Government has to authorize the operation of all church buildings; that higher education courses taken at seminaries lack accreditation; and that the clergy's inheritance rights are restricted.

In 1926 President Plutarco Elías Calles attempted to enforce the anticlerical provisions of the Constitution after the archbishop of Mexico had declared in a press interview that the Catholic church did not recognize the Constitution of 1917. The next three years were full of bloodshed. Intense negotiations between the Vatican, the Mexican government, and the Mexican Catholic hierarchy took place, while Calles intensified the implementation of the constitutional articles related to religious affairs. All churches and church-related programs were closed, foreign priests were deported, the government fixed quotas for the clergy, and other measures were implemented against the church. Violence ensued, and the bloody revolt known as the



The colonial Metropolitan Cathedral (above) and the modern Basilica of Our Lady of Guadelupe (below), both in Mexico City
Photos by Arturo Salinas

Cristero Rebellion broke out (see The Constructive Phase, ch. 1). Peace was restored in June 1929, thanks to the negotiations between President Emilio Portes Gil and the church, after which the government accepted a policy of peaceful coexistence.

However, only after 1940, when Manuel Ávila Camacho was elected president to replace Lázaro Cárdenas, did religious peace return to Mexico. Although Ávila Camacho had personally been involved in the campaign against the Cristeros, in 1932 he opposed the anticlerical attitudes of the Tabasco state governor and attempted to solve the problem for good. Therefore, at his first press conference he explicitly declared himself to be a Roman Catholic believer. Since then the anticlerical legislation has neither been enforced nor abrogated (see Revolution to Evolution, ch. 1). However, by the 1980s the church had again become a highly influential institution in both the political and the social spheres but worked most of the time behind the scenes.

According to the 1980 census, 60.2 million Mexicans, or 89.4 percent of the national population, declared themselves to be Catholics. In 1972 the church was formally organized into 11 archdioceses, 48 dioceses, and seven other jurisdictions known as *nullius prelatures*. That year the church had about 10,000 priests, two-thirds of whom were secular.

Mexican Catholicism, in practice, was extremely varied. It ranged from those who supported traditional folk religious practices, usually in rural isolated communities, to those who adhered to the highly intellectualized theology of liberation, to prayer groups of the charismatic renewal, or to the conservative Opus Dei movement. Lay groups with different goals, purposes, and political orientations were well known and common in contemporary Mexico. The largest and best known included Mexican Catholic Action, Knights of Columbus, Christian Study Courses, Christian Family Movement, and a wide range of university students' and workers' organizations.

The Virgin of Guadalupe has long been a symbol enshrining the major aspirations of Mexican society. According to Catholic belief, in December 1531 the Virgin Mary appeared on three occasions to a Christian Indian woodcutter named Juan Diego, on the hill of Tepeyac, only six kilometers north of Mexico City's main plaza. She spoke to him in Nahuatl language and identified herself by the name of Guadalupe. The Virgin commanded Juan Diego to seek out Bishop Juan de Zumárraga and to inform him of her desire to have a church built in her honor on that spot. After two unsuccessful visits to the bishop's house, Juan Diego returned to Tepeyac and was ordered by the Virgin to pick up some roses, carry them on his cloak, and attempt to make a third visit to the skeptical bishop. Once in the bishop's office, Juan Diego unfolded his cloak to present the roses, and an image of a mestizo Virgin had been miraculously imprinted upon it. Bishop Zumárraga acknowledged the miracle, and a shrine was built on the very site of the appearances.

Today, two neighboring basilicas of Our Lady of Guadalupe exist in that same area. The first basilica, which was dedicated in 1709, accommodated 2,000 worshipers; the new ultramodern basilica, inaugurated in October 1976, accommodated up to 20,000 people. Juan Diego's original cloak with the mestizo Virgin image imprinted on it hangs above the altar.

According to anthropologist Eric R. Wolf, the Guadalupe symbol links together family, politics, and religion; the colonial past and the independent present; and the Indian and the Mexican. It reflects the salient social relationships of Mexican life and embodies the emotions they generate. It is, ultimately, a way of talking about Mexico. Wolf's views are shared by Harvey L. Johnson of the University of Houston. For him, worship of the brown-skinned Virgin resulted in the reconciliation of two opposing worlds, in the fusion of two religions, two traditions, and two cultures. Since 1523 Guadalupe has been the center of all kinds of public and private activities. For example, when Father Miguel Hidalgo y Costilla launched the war for Mexican independence from Spain in 1810, he cried "Long live the Virgin of Guadalupe and down with bad government!" In modern times, devotion to the Virgin of Guadalupe has continued throughout Mexico and Latin America. Her name appears in thousands of books and articles, in song and in poetry.

Protestantism as a movement dates from the granting of freedom of worship by the Mexican constitution of 1857. However, as early as 1824, copies of the Bible were already being sent into Mexico by the London Missionary Society and Foreign Bible Society. The first form of organized Protestantism began in 1859, when a group of former Catholic priests formed the "Constitutional Fathers," which later became the Mexican Episcopal church. However, the first Protestant congregation was formally organized in Monterrey as the First Baptist Church on January 30, 1864. During the rest of the nineteenth century and early twentieth century, the number of Protestants grew slowly in Mexico—from 52,000 in 1900 to 178,000 in 1940.

According to the 1980 census, Mexico had 2.4 million Protestants, or 3.6 percent of the national population. These figures reflected a dramatic increase over the 1970 census, in which it was reported that Mexico had 876,879 Protestants, or 1.8 percent of the national population.

During the 1980s Mexican Protestants continued to expand their religious and social activities, which included dozens of churches, schools, hospitals, and student hostels distributed throughout the nation. According to the 1980 census, however, more than 61 percent of all Mexican Protestants were concentrated in the six states of México (15 percent), Veracruz (8.6 percent), Chiapas (8.3 percent), Puebla (7.4 percent), Tabasco (6 percent), and Tamaulipas (6.6 percent) and in the Federal District (9.3 percent). Among these were two major concentrations, the first around metropolitan Mexico City and the second in the southeastern states of Veracruz, Chiapas, and Tabasco.

The highest proportion of Protestants within an individual state population was found in four southeastern states. These were Tabasco, where 12.6 percent of the population was Protestant; Campeche, 10.1 percent; Chiapas, 9.5 percent; and Quintana Roo, 9 percent. This was likely owing to the fact that during the early twentieth century, the influence of the Catholic church in these remote and traditional rural areas was rather weak.

Regarding specific Protestant churches, the 1982 edition of the *World Christian Encyclopedia*, edited by David Barrett, published a comprehensive list of all organized churches and denominations in Mexico. Among these, the largest were the National Baptist Church, the Seventh-Day Adventist denomination, the Seventh-Day Baptist Church, the Church of Jesus Christ of the Latter-Day Saints (Mormon Church), the Methodist Church, the National Presbyterian Church, and the Jehovah's Witnesses denomination. In addition to these, there were about 70 smaller Protestant denominations, most of which were small missions from United States-based fundamentalist churches.

In 1980 some 285 different religious denominations were reported to operate at a national level. Jews accounted for 0.1 percent of the national population, according to the 1980 census. Nearly 30 percent of these lived in the state of México and 24 percent in the Federal District. There were both Ashkenazic and Sephardic synagogues in the Federal District, plus another new congregation of Jews. Bahais, which include Seri and Tarahumara Indians, experienced a rapid growth, from 10 local assemblies in 1964 to 96 assemblies in 1973. Buddhism, Hinduism, and other Asian religions were found among immigrants from East Asia. Muslims were also found, mostly among small communities of Lebanese, Palestinian, and Syrian Arab immigrants.

Health and Welfare

Health care and general welfare activities were the responsibility of a wide range of institutions from the public sector, the parastatal (see Glossary) sector, i.e., semiautonomous, mixed-owned corporations, the private sector, and the cooperative, or social, sector. All health systems continued to be administered in a centralized fashion from Mexico City, despite the beginnings of decentralization efforts in 1983 and 1984. In 1984 it was estimated that only 82 percent of the national population was served by medical- and health-related institutions, the remaining 18 percent relying heavily on traditional folk medical practices.

In 1984 Mexico City continued to be the best served locality in the nation with respect to health care; standards of health care varied tremendously elsewhere. At that time 17 percent of the national population, most of whom lived in rural communities of fewer than 500 inhabitants, lacked adequate health services and facilities. These rural dwellers usually had very high birth rates as well as major nutritional and intestinal problems. In such economically depressed rural and urban areas, health data were scarce and commonly falacious, thus making it difficult to discuss authoritatively the population's state of health.

In 1982 the Secretariat of Programming and Budget reported that during the past 40 years life expectancy had been increasing at an accelerated pace. From 41.5 years in 1940, life expectancy had risen to 58.9 years in 1960 and 64.3 years in 1975. The Pan American Health Organization reported that by 1980 life expectancy for men was 62.3 years and 66.1 years for women. The Population Reference Bureau estimated that by 1984 life expectancy had increased for men to 64 years and for women to 68 years. The general mortality rate (yearly registered deaths per 1,000 inhabitants) also decreased during those four decades, from 23.4 in 1940 to 16.1 in 1950 and from 11.5 in 1960 to an estimated 7.0 in 1977 (see Population, this ch.).

Mexico's infant mortality rate (deaths of children of one year of age or less per 1,000 live births) was considered during the 1970s and early 1980s to be among the highest in Latin America. In 1960 it was reported to be 74.2; this was reduced to 68.5 in 1970, to 58.7 in 1977, and to 55 in 1984. As a whole, it was reported that more than 66 percent of these deaths were owing to one of three causes: enteritis and other diarrheal diseases, influenza and pneumonia, and problems related to perinatal morbidity and mortality.

The eight leading causes of death in 1975, by groups of disease, were infections and parasites, which accounted for 17.7 percent of the registered deaths; respiratory diseases, 16.7 percent; circulatory diseases, 15 percent; accidents, poisoning, and general violence, 12.4 percent; digestive diseases, 6.3 percent; cancer, 5.2 percent; perinatal morbidity and mortality, 5 percent; and nutritional and metabolic disturbances, 4.1 percent. In 1976 the distribution of the registered deaths per age-group at the national level was as follows: birth to four years, 36.5 percent; five to 14 years, 3.9 percent; 15 to 24 years, 4.8 percent; 25 to 49 years, 14.3 percent; 50 to 64 years, 11.1 percent; and 65-plus years, 28 percent. The age-group distribution of the aforementioned causes, as expected, also varied. Although enteritis and other diarrheal diseases were the major causes of death for those under age four, accidents and homicides were the major causes for those between 15 and 24 years of age, and coronary diseases for those over 65.

In 1978 the Mexican government reported that of a total of 9.5 million cases of disease, 61.3 percent were related to the respiratory system, 36.6 percent ot the digestive system, e.g., eneritis, diarrheal diseases, and amebiasis, and 2.1 percent to the skin. Regarding diseases preventable by vaccination, in 1982 the government reported 13,000 cases of measles, 3,300 cases of whooping cough, and 98 cases of poliomyelitis. There were not any cases of diptheria. In 1982 there were 49,000 reported cases of malaria, mostly in the Pacific coastal states of Chiapas, Guerrero, Michoacán, Oaxaca, and Sinaloa. Four years earlier, the Pan American Health Organization reported very few cases of Chagas' disease (three per 1,000 inhabitants) or of leishmaniasis (23 per 200,000 inhabitants).

By the early 1980s cardiovascular diseases, diabetes, and cancer had become major diseases in Mexico. In 1981 almost 60 of every 100,000 Mexicans suffered from hypertension. That same year it was estimated that almost 5 percent of the national population suffered from diabetes. Ironically, the growing incidence of these "diseases of the developed world" was viewed as a measure of progress.

In 1983 the Mexican Congress amended Article 4 of the Constitution of 1917 to include a paragraph that added the right to receive health protection as a citizen's basic human right. This constitutional amendment was the beginning of government policies directed toward providing adequate health care to all citizens by the year 2000.

The Secretariat of Health and Public Assistance was the fed-

INSTITUTO MEXICANO DEL SEGURO SOCIAL

IMSS medical center, Mexico City
Photo by Arturo Salinas

eral cabinet-level institution responsible for providing adequate medical services and facilities, public health, and general welfare to the national population. It was in charge of a wide range of activities, from the writing of norms and regulations to the provision of low-cost or free medical services to the population that lacked other means of health care. Most of its activities and programs were coordinated through a special program called the National Health System.

This nationwide system consisted of all health-related public sector institutions at the federal, state, and municipal levels; private sector institutions; parastatal institutions; and cooperative organizations that worked to maintain and improve the health of the national population. It also included those organizations in charge of public health and welfare. However, in practice, the delegates to the National Health System served only as an advisory council to the office of the secretary of health and public assistance.

The federal, state, and municipal governments funded three distinct kinds of medical services. The first consisted of the facilities operated directly by the Secretariat of Health and Public Assistance, which in 1984 served 18 percent of the national population. The second consisted of those services and facilities operated by a joint program administered by the Mexican Social Security Institute (Instituto Mexicano del Seguro Social—IMSS) and the General Coordination of the National Plan for Economically Depressed Zones (Coordinación General del Plan Nacional de Zonas Deprimidas y Grupos Marginados—COPLAMAR), which in 1984 served 15 percent of the national population. Finally, a smaller percentage of state, municipal and, in fewer cases, university hospitals, offered services through specific institutions.

Usually these public services were intended for the urban and rural poor and were offered through a wide range of hospitals and small clinics nationwide. In 1984 the secretariat's units included 19,034 hospital beds that were served by 14,638 physicians, while the IMSS-COPLAMAR program had 1,565 hospital beds served by 3,729 physicians. Senior year medical students played an important role in these medical units, as part of a compulsory civic service program, before obtaining their medical degrees.

Another mechanism by which the Mexican government promoted the health and welfare of its citizens was through the extensive system of social security, which was established by law in Article 123 of the Constitution of 1917. That law declared a public need for a social security system that would provide for income for disability, old-age and retirement; health, accident, and life insurance; child-care centers; and any other social services whose goal was the general protection and welfare of workers, peasants, those without a salary, and all other social groups. In practice, the social security system developed into one that serviced workers and largely ignored the other social groups mentioned in Article 123.

By law, all workers had to join their respective social security institute and pay a corresponding monthly fee that accredited them and their dependents as beneficiaries. This monthly fee was supplemented by contributions made by the government and by the employer. There was no overall national agency coordinating or supervising all the existing social security institutes, funds, or programs. Each specific fund or program had its own regulations, sources of revenue, systems of benefits, eligibility, and restrictions to such benefits.

The benefits included the right of the insured and his or her family to use the specific institute's national network of hospitals and clinics, sickness and maternity benefits payments, work injury compensation, and old age, disability, and survivor pensions. Besides those, there were still other benefits, such as funeral aid, low-interest mortgage loans for home buyers, day-care centers, and vacation resorts, among others.

In 1984 the two most important health and general welfare institutions nationwide were the IMSS and the Security and Social Services Institute for Government Workers (Instituto de Seguridad y Servicios Sociales para Trabajadores del Estado— ISSSTE). The first was oriented mostly to private sector workers, while the second was oriented to civil servants. In 1984 the IMSS was the largest and best equipped social security institution in Mexico. Its services and facilities were more numerous than those of the Secretariat of Health and Public Assistance and served more than 7 million workers (26.8 million, including dependents) in 1982.

The ISSSTE functioned similarly for most civil servants and teachers. In addition, some public sector and parastatal organizations offered medical services to their workers and dependents through their own social security programs, which were independent of the ISSSTE. Among the organizations having their own social security institutes were PEMEX, the Mexican National Railways, the Secretariat of National Defense, the Secretariat of the Navy, and the Secretariat of Finance. In 1979 these public sector and parastatal social security programs provided health care to 6 percent of the national insured population.

Among the most important public welfare services offered by the Secretariat of Health and Public Assistance were those coordinated by the National System for the Integral Development of the Family (Sistema Nacional para el Desarrollo Integral de la Familia—DIF). The general purpose of these programs was to reincorporate into society those persons who were deprived of a normal process of social integration because of individual social circumstances or physical and mental problems. In 1984 the DIF's most important social welfare programs and activities included the following: assistance to persons who, owing to socioeconomic problems or handicaps, could not satisfy their basic subsistance and development needs; assistance in special centers both to children and to the elderly who were abandoned and who lacked resources; promotion of general welfare for the elderly and of programs to prepare the general population to cope with old age; complimentary food and nutritional advice to poor, pregnant women; legal advice and social orientation for poor minors, the elderly, and the handicapped; general research on the basic causes and effects of the major problems that required social assistance; funeral services; and support for the education and training of those persons who had major socioeconomic problems.

The most important institutions and organizations under the auspices of the DIF were the National Institute of Science and Technology for Children's Health, the National Institute for the Rehabilitation of Blind Children and the Visually Impaired, the

National School for the Blind, two houses for the elderly, 18 foster homes, and 42 community development centers. The activities of these DIF institutions were supplemented by those offered by the National Institute for the Elderly and by those special programs of the two largest social security institutions. These included free public homes and clubs for the elderly, technical job-training centers, and mobile community health units.

In 1984 it was estimated that more than 40,000 physicians worked in private practice throughout Mexico, in addition to those who worked for government programs. During that year the private sector owned and operated about 1,000 hospitals, or 20 percent of the hospitals in the country. Their proprietors were organized in the National Chamber of Hospitals.

Education

The Revolution and the System of Education

One of the major reforms of the Mexican Revolution was a comprehensive change in the country's educational system. Educational change symbolized, in many ways, the meaning and implications of the Revolution. Its basic goal was to formulate the national ideology of Mexicanidad ("Mexicanness"), based on individual attitudes regarding identity, loyalty, and civic responsibility, as well as on an awareness of the national past and the present. Article 3, which regulates the educational system, was one of the most important and lengthy articles in the Constitution of 1917.

Article 3 has been amended on various occasions. In 1984 it began by stating that the basic goals of the Mexican educational system regarding the individual are "to develop harmoniously all the faculties of the human being and foment in him, at the same time, love of country and a sense of international solidarity in independence and justice." It went on to say that the responsibility for education is shared by the federal, state, and municipal governments; that all public education shall be free; that primary education is compulsory; that private education is allowed at all levels, but that in the specific case of primary, basic-secondary, normal, peasant, and workers' schools, private educational centers require government authorization that may be denied or revoked at any time without chance of future appeal.

In 1921 the Secretariat of Public Education was established and was given full cabinet status to promote the organization and functioning of the educational process. José Vasconcelos was named as the first secretary of public education and served until 1924.

Vasconcelos' ideas and actions elevated the Secretariat of Public Education to the high status in government circles that it still enjoyed 60 years later and established its basic purposes and much of its apparatus. An eminent lawyer and a distinguished philosopher and sociologist, Vasconcelos sought to promote the educational role played by the Mexican Revolution. During his tenure the federal government established more than 1,000 rural schools, opened hundreds of popular libraries, and widely distributed all kinds of books. As part of his social program, the government also created a system of rural schools called People's Houses, which combined the functions of a schoolhouse, an agricultural extension division, and a community meeting place. Mexican schools, as a result of the vigorous efforts of Vasconcelos, became an ideological arm of the Revolution (see The Constructive Phase, ch. 1).

The Secretariat of Public Education assumed overall responsibility for all levels of the Mexican educational system in its 31 states and the Federal District. It was also responsible for regulating the academic calendar, curriculum content, free textbook distribution program, grading scales, and graduation requirements in all types of primary and lower secondary schools. To accomplish its task, in 1980 the federal government provided the secretariat with a budget of 160 million pesos, which in that year represented 12 percent of the total federal budget. In 1980 the Secretariat of Public Education employed nearly 50 percent of all public-sector employees.

Mexico's twentieth-century educational achievements have been impressive. For example, although in the early days of the Revolution some 850,000 children attended elementary school, in 1984 this number had increased to 15.4 million. In 1921 the illiteracy rate was more than 70 percent of the population; by 1980 it had been reduced to 17.1 percent.

In 1959 the Mexican government unveiled what became known as its 11-year plan called the National Plan to Improve and Expand Primary School Education in Mexico, whose goal was to offer free primary education to all Mexican children nationwide. During this period an ambitious program of school construction was implemented, making use of prefabricated rural classrooms and schools that included housing for teachers. In that same year the government established the "National Commission for Free Textbooks" to be in charge of preparing, publishing, and distributing free textbooks and workbooks to all children attending the six grades of public and private primary schools nationwide. By 1981 the federal government distributed more than 82 million textbooks free of charge to some 57,000 schools. These books and school materials became the property of the student. Educational television became important in the 1960s through the *telesecundaria* (televised secondary education) program, especially to those students living in rural Mexico.

New educational reforms, characterized by the change of syllabi and a greater effort in teacher training at all levels, were established in the 1970s. Among these programs were three introduced in 1979: the Primary Education Program for All Children, the Accelerated Primary School Program, and the opening of the National Teachers' University.

The goal of the first of these reforms was to give an opportunity to all school-age children (ages six to 14) to attend elementary school, finish all its courses, and improve the quality of their education. In 1979 the Secretariat of Public Education announced that by 1980 no child in Mexico would be without access to a primary school. The only expected limitations were those related to the Indian school-age population.

Through the Accelerated Primary School Program the government opened elementary schools in rural areas that traditionally lacked such facilities and authorized these schools to offer the traditional six years of primary education in three years. The program's goal was to serve a population of 1 million school-age children. The National Teachers' University offered teachers the opportunity to earn higher degrees in fields related to preschool and primary education. Also in that year adult education was strengthened, and technical and vocational education received strong governmnent support.

Although the expansion of primary-school enrollment during the 1970s was faster than population growth, the new educational opportunities were not distributed equitably. Urban areas continued to benefit more than rural areas, and within the latter, larger settlements continued to enjoy greater opportunities than smaller rural settlements.

Researchers at Mexico's Center of Educational Studies found that in 1979, of 100 children who began elementary school in that year, 75 who lived in urban areas were expected to finish sixth grade, but only 15 of those who lived in rural areas were expected to do the same. The study went on to project that of all students who began their elementary education in 1979, only 8 percent would finish a professional degree, while 23 percent would drop out before the second grade and another 22 percent would drop out before finishing elementary school. Other Center of Educational Studies research, conducted in 1970, found that within the population of those six years of age or older, 35 percent (13.4 million) lacked any kind of school training, 31 percent (11.8 million) had attended school only one to three years, 25 percent (9.6 million) had attended school from four to six years, and 9.1 percent had at least some secondary education. Only 1.5 percent of those had any higher education. In 1979 some 7 million Mexicans age 14 or older had never registered at an elementary school, and some 13 million others had dropped out before completing three years of primary school.

Structure of the School System

The Mexican educational system was composed of three distinct levels: the elementary, the secondary, and the higher education levels. The elementary level was divided into kindergarten *(jardín de niños)* and primary education *(enseñanza primaria)*. The secondary level was divided into two distinct cycles: the basic high school *(enseñanza media básica)*, which consisted of a three-year program, and the *bachillerato*, or *preparatoria*, which required an additional two or three years of secondary school. The higher education cycle consisted of a wide array of educational institutions, such as universities, teachers' colleges, and technical educational institutions.

Kindergarten was the first optional step of the Mexican educational ladder and was designed for children of ages four to six. Kindergartens were found in both urban and rural areas; however, most were situated in big cities and in less than adequate facilities. In the 1982–83 school year Mexico had a total of 24,810 kindergartens, 92 percent of which were supported by the public sector and served a total of 1,689,578 children. During the 1978–79 school year only 16 percent of the four-to-six age-group was served by kindergartens.

Primary school consisted of a six-year, free, compulsory program for all children ages six to 14. The government used standardized elementary-school textbooks, which were distributed nationwide at all elementary schools, whether private or public. Like other levels of the educational system, primary education was mainly the responsibility of the federal and state governments. Private education had a diminishing student enrollment, which in the 1982–83 school year represented only 5.2 percent of the total primary enrollment. Some authors suggest that during the 1978–79 school year, 92 percent of the population ages six to 14 were enrolled in or had finished primary school. Four years later, during the 1982–83 school year, Mexico had in operation

78,395 primary schools that served an estimated student population of more than 15 million. However, the accuracy of these figures was questioned by other authors. In 1971 some 64 percent of all primary schools were single-teacher schools, that is, a single teacher was in charge of all six grades.

Rural elementary schools constituted the major educational problem in contemporary Mexico. Part of the problem was that most of the government's attention in rural areas was concentrated on providing schools to those settlements having a population of more than 1,000 inhabitants. Those settlements having fewer than 1,000 inhabitants—where some 23 percent of rural school-age children lived in the 1970s—were traditionally neglected. Rural schools for Indians usually had Indian teachers, and classes were conducted bilingually, in Spanish and the local tongue. Other schools, called social integration centers, offered accelerated primary education to teenage Indians, emphasizing the learning of technical skills.

The basic high school cycle in the secondary level at Mexico's school system usually consisted of three years of education and included day schools for adolescents, night schools for working adults, and technical schools that offered industrial and commercial training. It was estimated in 1979 that 81 percent of elementary school graduates enrolled in some kind of secondary education. During the 1982–83 school year, Mexico had 13,362 basic high schools having a total of 3.6 million students.

After finishing the basic cycle, a student may consider continuing his or her training in an upper secondary educational institute. At this level, however, the student will find a great variety of educational institutions that will offer two- to three-year programs. Although some of them will prepare the student for further university studies, others will offer training in certain fields of study—such as nursing, social work, and preschool and primary teaching—and, upon completion, will receive a certificate to practice that profession.

Traditionally, upper secondary educational institutions were controlled by institutions of higher education; however, there was a trend in the early 1980s to establish separate institutions. This was possible because there was no constitutional restriction placed on upper secondary education. Any organization or individual could offer any upper secondary program of studies upon obtaining certification or accreditation of its courses. There were two broad categories of upper secondary institutions: the first was the *bachillerato* (not to be confused with the bachelor degree) or *preparatoria* (preparatory) schools for those going on to university studies; the second, geared to those who chose a mid-level professional career, were called *estudios tecnológicos* or *estudios profesionales* (technological studies or professional studies) and did not require university training.

In 1984 a Mexican newspaper reported the findings of two surveys conducted to evaluate secondary schools. The first survey concluded that secondary schools were disorganized and lacked a sense of direction and that drop-out rates had climbed to more than 40 percent. The second survey found that the number of private secondary schools had increased in the 1982–84 period and that their enrollment had increased to 28 percent of total secondary-school enrollment.

In 1982 Mexico had more than 260 institutions of higher education that included different kinds of universities, institutes, colleges, centers, and schools. Their enrollment varied from fewer than 1,000 students to more than 290,000. Forty-five percent of the university student population was concentrated in Mexico City, and an additional 20 percent was found in Monterrey and Guadalajara.

Higher education in Mexico consisted of various kinds of institutions: public and private, universities and technical institutions, centralized and decentralized, and large and small. The federal government did not control the university system. All public universities operated under special statutes passed either by Congress, as in the case of the National Autonomous University of Mexico (Universidad Nacional Autónoma de México—UNAM), or by one of the state legislatures. Private institutions did not require federal authorization but did require that the federal government or the state government validate their courses, degrees, and professional titles.

Institutions of higher education did not necessarily accept one another's upper secondary programs as equivalent. Students applying for admission at a different institution from the one in which they took their upper secondary courses sometimes needed to take additional courses or revalidate those taken to obtain adequate credits. Undergraduate programs prepared students to practice a profession and concluded with the granting of the professional title of *licenciado*. The length of these programs varied from two and one-half years to six or more years.

In 1982 Mexico had 32 public autonomous institutions that were funded either by the federal government, a state government, or a combination of the two. The largest of these, UNAM, was founded in 1551 as the Royal and Pontifical University of Mexico. Over the years UNAM has undergone major reorganizations and has received a special status. In 1929 Congress granted UNAM the status of "autonomous," that is, the privilege of running its own internal affairs. In 1945 the university underwent a major reorganization and became a public corporation juridically separate from the government. In 1953 UNAM began to move all its facilities from its antiquated downtown quarters to the newly created suburban University City, where all programs and facilities could be accommodated. Because of the rapid growth in enrollment in the late 1960s, a decentralization of UNAM's professional studies program had to be implemented. The program called for the reinstatement of entrance examinations and the redistribution of UNAM's National School of Professional Studies to five locations within the metropolitan area of Mexico City.

In 1982 UNAM was divided into 12 *facultades* (teaching faculties), five national schools (in addition to the five national schools of professional studies), several dozen research institutes, and several general preparatory schools for students in the upper secondary education level. Enrollment figures for 1980 showed that UNAM had a conservatively estimated total of 290,000 students. Of these, an estimated 155,000 were at the undergraduate level, an estimated 10,000 in graduate and research institutes, and an estimated 125,000 in its preparatory schools.

In 1973 Pablo Latapí of the Center of Educational Studies found that 90.4 percent of UNAM's students came from families having incomes above the national monthly average, equivalent to US$86. He also reported that a 1964 study of UNAM students found that of every 100 students, 11 came from families with monthly incomes of US$196 or less, 76 from families with incomes between US$196 and US$520, and eight from families with incomes of more than US$520. Therefore, it could be suggested that a majority of UNAM's students had middle-class backgrounds. Only 11 percent came from the lower class.

A second category of higher educational institutions consisted of approximately 100 institutions created, funded, and in some ways controlled by the federal government through the Secretariat of Public Education. Among these schools were the National Polytechnic Institute (Instituto Politécnico Nacional—IPN), various regional technological institutes, state universities, teachers' colleges, and special-purpose institutions.

The IPN was Mexico's second largest university-level institution and was among the most prestigious schools of higher technical education. Its role was to provide higher education in the fields of technology and science and to supervise other higher level technical institutes in various locations around the country. It offered programs of study at the upper secondary, undergraduate, and graduate levels. During the 1970–80 school year 85,670 undergraduate students were enrolled in one of its 14 academic divisions, most of which were located in the Federal District.

There were three broad categories of private institutions of higher education, where 44 percent of all university students were enrolled in 1980. Some had programs that granted official certification by presidential decree; others had individual programs recognized or incorporated by other institutions or agencies; and, finally, some institutions had programs lacking any official certification.

There were only eight universities in the first category (sometimes known as *universidades libres*). They had not only the authority to grant official transcripts and degrees but also the right to establish programs of study in any location in the country. Two of Mexico's most prestigious institutions—the Institute of Technology and Higher Education of Monterrey and El Colegio de México—fell into this category.

The Institute of Technology and Higher Education of Monterrey, founded in 1942 by a group of Monterrey industrialists to provide personnel for local enterprises and modeled on the Massachusetts Institute of Technology, was among the most prestigious Latin American institutions of higher technical education. It offered programs of study at the upper secondary, undergraduate, and graduate levels and had established branches in various sites throughout Mexico.

The small and highly influential El Colegio de México was founded in 1938 as a center for the academic refugees of the Spanish Civil War. In 1940 it adopted its current name. In the early 1980s it offered only one undergraduate program, that in international relations, and continued its role as primarily a graduate-level and research institution. In 1977 it had 200 students, most of whom were enrolled in masters and doctoral programs in the humanities and social sciences. It also contained one of Mexico's leading "think tanks."

There were more than 100 institutions of higher education that had not been granted the status of *universidad libre* but whose programs had been granted official accreditation. These institutions, excluding private higher teacher training institutions, accommodated only 14 percent of all students enrolled in institutions of higher education. Most were small and had fewer than 1,000 undergraduate students. Many concentrated on specific areas or disciplines.

Finally, under the category of private institutions whose programs lacked any official accreditation were found religious training institutions. Their programs of study violated constitutional restrictions. Some of these institutions also offered graduate programs for students who did not receive a professional credential.

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There is a wealth of English-language and Spanish-language literature describing Mexican society. However, no single work does justice to Mexico's socioeconomic complexity and to its rapid processes of change. The high quality of the publications of numerous Mexican scholars should be stressed.

Socioeconomic statistical information, including both raw material and processed material, has been systematically published by the Mexican government's Secretaría de Programación y Presupuesto. Its publications include a wide variety of documents, reports, studies, atlases, as well as census data. One of these is the annual *Agenda Estadística*, a pocket-sized book filled with data on a variety of subjects.

Studies of urban Mexico cover a wide variety of subjects. The classic among them is *El Desarrollo urbano de México: diagnóstico e implicaciones* by Luis Unikel et al. Other publications are mostly case studies, such as Larissa Lomnitz' *Networks and Marginality: Life in a Mexican Shantytown*, Wayne A. Cornelius' *Politics and the Migrant Poor in Mexico City*, and Lourdes Arizpe's *Migración, etnicismo, y cambio económico: un estudio sobre migrantes campesinos a la ciudad de México*.

Studies of rural society also cover a wide variety of subjects and date back to the 1940s. Among them, a good introduction can be obtained in Rodolfo Stavenhagen's "Social Aspects of Agrarian Structure in Mexico." in *Agrarian Problems and Peasant Movements in Latin America*. Among the many authors who have done extensive studies of rural Mexico are Gonzalo Aguirre Beltrán, Shlomo Eckstein, Henri Favre, George M. Foster, June Nash, Margarita Nolasco Armas, and Eric R. Wolf. A valuable reference book is Evon Z. Vogt's *Bibliography of the Harvard Chiapas Project: The First Twenty Years, 1957–77*. (For further information and complete citations, see Bibliography.)

Chapter 3. The Economy

A representation of Mexican campesinos,
from a painting by Diego Rivera

IN 1984 MEXICO had the fifteenth largest economy and was the eleventh most populous nation in the world. In 1983 it had been the ninth largest in terms of productive capacity, the fourth largest producer and exporter of oil, and held the first five positions in the production of 14 metallic and nonmetallic minerals. Agriculture was diversified, its cattle herds were among the world's largest, and its industrial base was larger than that of several developed countries and most developing countries. In 1983 Mexico's gross domestic product was 17,419 billion pesos (US$117.2 billion), or approximately 230,100 pesos (US$1,550) on a per capita basis.

Between 1950 and 1980 the agricultural sector grew at an impressive rate that approached 4 percent per year. The industrial sector, however, was the engine of growth that propelled the economy to expand at an annual average rate of 6 percent between 1940 and 1980. The industrial sector's share in the gross domestic product grew from 26 percent in 1950 to 40 percent in 1980. Over this period Mexico's gross domestic product grew from 41 billion pesos (US$4.7 billion) to 4,300 billion pesos (US$186.3 billion).

This rapid and sustained period of economic growth brought about major structural transformations. Prior to the 1940s minerals accounted for more than 60 percent of Mexico's merchandise exports, and agricultural exports accounted for less than 30 percent. By 1950 agriculture's share had surpassed 50 percent, and minerals had declined to about 33 percent. During the 1950s and 1960s agricultural exports represented one-half of total exports and were the leading supplier of foreign exchange to fuel Mexico's ambitious industrialization program. By 1974 manufactured products accounted for more than 50 percent of the total export share, while agriculture declined to 39 percent and mineral exports fell to 7 percent. Thus, Mexico ceased her dependence on nonfuel primary exports and joined the ranks of the newly industrialized countries. During the mid-1970s large deposits of oil and natural gas were discovered. By the late 1970s Mexico had become self-sufficient in energy resources, and oil and natural gas exports provided the financial wherewithal to spur Mexico's economic and social modernization to higher levels of achievement.

Nevertheless, substantial economic and social inequalities persisted. Economic activity and the benefits of economic growth were overly concentrated in the industrial triangle of Mexico

City, Monterrey, and Guadalajara, where approximately two-thirds of manufacturing but only slightly more than one-fourth of the total population was located. During 1983 and 1984, as the country withdrew from its most severe economic crisis since the Great Depression of 1929, agriculture was characterized by structural imbalances and rigidities. The production of food for domestic consumption was largely located in rain-fed regions of the country that were adversely affected by vagaries in the weather, while the commercial cultivation of export crops was concentrated in the irrigated districts of the north.

Despite massive financial transfers and subsidies to agriculture since 1980, Mexico could not produce enough food to feed her rapidly expanding population, and substantial food imports were still necessary. Land reform was reaching the limits of land available to redistribute to landless peasants. Sources of rural employment were insufficient, and the rural underemployed streamed to the larger urban centers or migrated to the United States in search of work. Industry was geared toward the large domestic market, and non-oil exports had fallen to only one-fourth of total exports, while oil exports continued to account for three-fourths of all exports. Under the administration of President Miguel de la Madrid Hurtado, sober and realistic adjustments were undertaken to correct these imbalances.

Growth and Structure of the Economy

The period betwen the call for independence from Spanish rule in 1810 to the beginning of the dictatorship of Porfirio Díaz in 1876 was characterized by economic stagnation. The Wars of Independence from 1810 to 1821 paralyzed the economy. Both agriculture and the mainstay of the economy, mining, were adversely affected by the destructiveness of the wars. Until 1876 political instability, internal struggles, two wars with France, and one with the United States prevented a hospitable climate from being forged that would have attracted the necessary foreign investment to develop the country or would have integrated the disparate pockets of economic activity into a cohesive national market.

Aside from a few roads, the road system during this period was highly inadequate. The country was fragmented into a patchwork of thousands of isolated communities. Commerce was negatively affected by regressive federal taxes placed on imports and exports and by onerous state taxes on business transactions. Consequently, domestic production and exports were more expensive than competitive products that were imported.

Manufacturing provided the only positive exception to economic stagnation. Between 1854 and 1877 Mexico's textile industry doubled its production of processed items behind high tariff walls and other state and federal government policies designed to benefit both national and foreign entrepreneurs.

During the Díaz administration (1876–1911) political order was restored, and peace and stability ensued. Foreign investment was attracted to Mexico by its potential resources and by the political stability of the Porfirian peace. During the Porfiriato (the period of Díaz' rule), the Mexican economy underwent a profound transition from stagnation to a period of slow but sustained economic growth. Díaz actively promoted foreign investment in agriculture, mining, industry, and transportation on the premise that foreign commercial interests possessed the requisite capital, skills, and access to international markets that Mexico vitally needed to develop its economy. About 24,000 kilometers of railroads, using foreign capital, were constructed by 1911. Although the railroads were built primarily to transport export products to the Gulf of Mexico and also to the United States, they served to integrate the national economy and link the country to the world economy. About one-fourth of all foreign investment was concentrated in the mining sector, and 3 percent flowed into the production of oil. Less than 2 percent of the foreign investment in manufacturing derived from the United States and Britain. Over 55 percent of France's foreign investment in Mexico was concentrated in manufacturing, particularly textiles. Domestic investment capital was largely concentrated in the manufacturing sector (see The Railroad, Mining, and Oil Industries, ch. 1).

Domestic production was stimulated by the expansion of foreign demand for Mexican food crops and raw materials. Mexico's export earnings increased by about 6 percent annually over the 1877 to 1911 period. In addition to the export of the precious metals of gold and silver, other metals such as copper, zinc, lead, graphite, and antimony, increased accordingly. In response to external demand, henequen, lumber, cattle hides, coffee, cotton, cattle, sugar, vanilla, and chicle exports became important sources of foreign exchange. Mining and railroad construction created the demand that led to the development of Mexico's first iron and steel factory (Fundadora de Fierro y Acero de Monterrey) in 1903. Manufacturing was encouraged by liberal import regulations, export incentives, high protective tariffs, inexpensive transportation costs, and the abolition of the transactions tax on business.

Overall, between 1877 and 1911 the gross domestic product (GDP—see Glossary) grew by 2.6 percent per year. Imports replaced a large number of local labor-intensive artisan workshops, foreign interests owned 97 percent of the mining sector, labor was abundant and wages were low, peasants and Indians were dispossessed of their lands, and land was increasingly concentrated in the hands of a few large landowners. Nevertheless, the period under Díaz was important because export-led growth based on foreign capital and technology laid the foundations of a modern economy.

Between 1910 and 1925 the devastation that the Mexican Revolution unleashed on the country seriously affected the economy. Although GDP grew by 2.5 percent over the period, manufacturing and agricultural production grew by only 1.7 percent and 0.1 percent, respectively. Mining and oil production grew by 5.6 percent annually. Moreover, the banking system and public credit institutions almost disappeared, the railroads were destroyed, livestock were almost wiped out, and foreign investment came to a virtual standstill. After 1920 the economy resumed its growth, but in 1929 the economy was struck by the Great Depression.

In 1929 and 1930 the railroads were nationalized, the pace of land reform increased, and large landholdings were expropriated. By 1930 the population had increased by 9 percent over 1910 levels, to 16.5 million inhabitants. The economically active population, however, numbered 5.1 million, or 113,000 less than in 1910. Agriculture employed 70 percent of the economically active population, and manufacturing employed 12 percent. Exports dropped from the equivalent of US$285 million in 1929 to US$97 million in 1932. Similarly, imports declined from US$184 million to US$58 million. Imports declined so precipitously because two-thirds of Mexico's trade was with the United States, which suffered acutely from the effects of the depression.

In 1930 import tariffs were raised by 25 percent on textiles, luxury goods, agricultural products, and food. The effects of the 30-percent devaluation of the peso against the United States dollar between 1929 and 1930 made exports cheaper and imports dearer; as a result, domestic manufacturing was effectively protected from foreign competition. Nevertheless, exports were prevented from responding to the beneficial effects of the devaluations because of the ongoing worldwide depression. Consequently, export revenues and taxes on exports declined and, in the pre-Keynesian world of the early 1930s, government expenditures were forced to decline by almost 8 percent and the money supply by almost 7 percent in the face of diminished government revenues from exports.

Between 1933 and 1940 the government promoted agrarian reform and created agricultural development banks; the National Development Bank (Nacional Financiera—NAFINSA); and the National Foreign Commerce Bank of Mexico (Banco Nacional de Comercio Exterior de México—BANCOMEXT). It also nationalized the oil industry. During this period of institutional reform, the economy expanded by 3.8 percent per annum. At the same time, both monetary and fiscal policies were expansionary owing to increased investments in agriculture and the creation of infrastructure. In 1937 and 1938 tariffs and customs duties were raised. Following the expropriation of the oil industry in 1938, Mexico was forced to devalue the peso from 3.60 to 5.19 pesos to the United States dollar by 1939. Although import substitution industrialization, i.e., the replacement of goods previously purchased abroad with domestically produced industrial goods destined for the home market, had not been a specific objective of government policy during the 1930s, it began to make a slow advance during this period.

After three decades of revolution, depression, and institutional reform, the economy began to grow at a fast pace during the 1940s. GDP grew by 6.7 percent per year, and the population increased by 2.8 percent annually. Economic growth was stimulated by the expansion of foreign demand following the outbreak of World War II. External demand and the wartime shortage of foreign goods induced industry to operate at full capacity, and workers often rotated three shifts a day to produce enough goods to meet internal and external demand. In the immediate postwar years, 1946–50, output was stimulated by increased domestic demand arising from the active promotion of import substitution industrialization policies. Import controls were increased to cut down on the inflow of consumer goods but were reduced on capital goods in order to replace worn-out machinery. In addition, an undervalued exchange rate encouraged exports through 1948. During the 1940s manufacturing grew by 8.1 percent per annum, agriculture increased by 5.8 percent, and mining and oil grew by only 2.5 percent. By 1950 Mexico's road network had expanded to 21,000 kilometers, of which about 13,600 were paved, 6,000 were all-weather gravel roads, and 1,900 kilometers were graded.

During the 1950s the economy grew by 6.1 percent, a rate slightly lower than that of the previous decade. Population growth increased to an average of 3.1 percent annually. By 1960 one-half of the population lived in urban areas. Output was redirected toward the domestic market as the external terms of trade turned against Mexico and the demand for import-competing goods expanded. Moreover, government policy actively promoted import substitution industrialization and internal trade. Industry was encouraged through flexible commercial policies as public investment flowed into the construction of roads, irrigation projects, railroad modernization, and electrical power generation. Generous subsidies were provided to the national airlines and the bus system, and fuel costs were kept low in order to expand participation in external and internal trade.

Economic activity was led by manufacturing, which grew by 7.3 percent annually. Mining followed with a 5.3-percent annual growth rate, and agriculture recorded a 4.3-percent annual growth rate. By 1960 Mexican ties to the United States market had increased. Exports to the United States represented 62 percent of the total value of Mexico's merchandise trade and approximately 72 percent of its imports by value. Between 1950 and 1960 about 25,000 new factories came into being, raising the total to about 100,000 factories. Foreign investment reduced its presence to only 2 percent in transportation and to 15 percent in mining, while in industry it rose to 44 percent of total investment and in commerce to 16 percent; and in public services it remained at 18 percent. Tourism expanded as well. About 408,000 tourists visited Mexico in 1950 and 681,000 in 1960. The road network expanded to 45,000 kilometers, of which 7,400 were graded roads, 10,300 were all-weather gravel roads, and 27,400 kilometers were paved.

Between 1960 and 1970 GDP grew by 7 percent per annum, and the population growth rate increased annually by about 3.2 percent. Manufacturing grew by 7 percent annually, mining by almost 4 percent, commerce by 5.5 percent, and agriculture by 3.4 percent. By 1970 Mexico was largely self-sufficient in food crops, steel, and most consumer goods. Production had been oriented toward the domestic market and supplied it with most of the agricultural and manufactured goods consumed in Mexico. Exports had become more diversified, and Mexico was no longer trading vital raw materials for manufactured commodities. Imports were high, but they consisted mostly of capital goods rather than consumer items. Foreign investment in manufacturing reached record levels, and the United States accounted for over US$1 billion of the total.

Economic growth caused the middle class to expand. The marginal urban and rural poor benefited from inexpensive food and basic supplies that were sold through the retail outlets of the National Company for Popular Sustenance (Compañía Nacional de Subsistencias Populares—CONASUPO), which had been created in 1961. The Metro subway system was completed in

Mercado de la Merced

Photo by Arturo Salinas

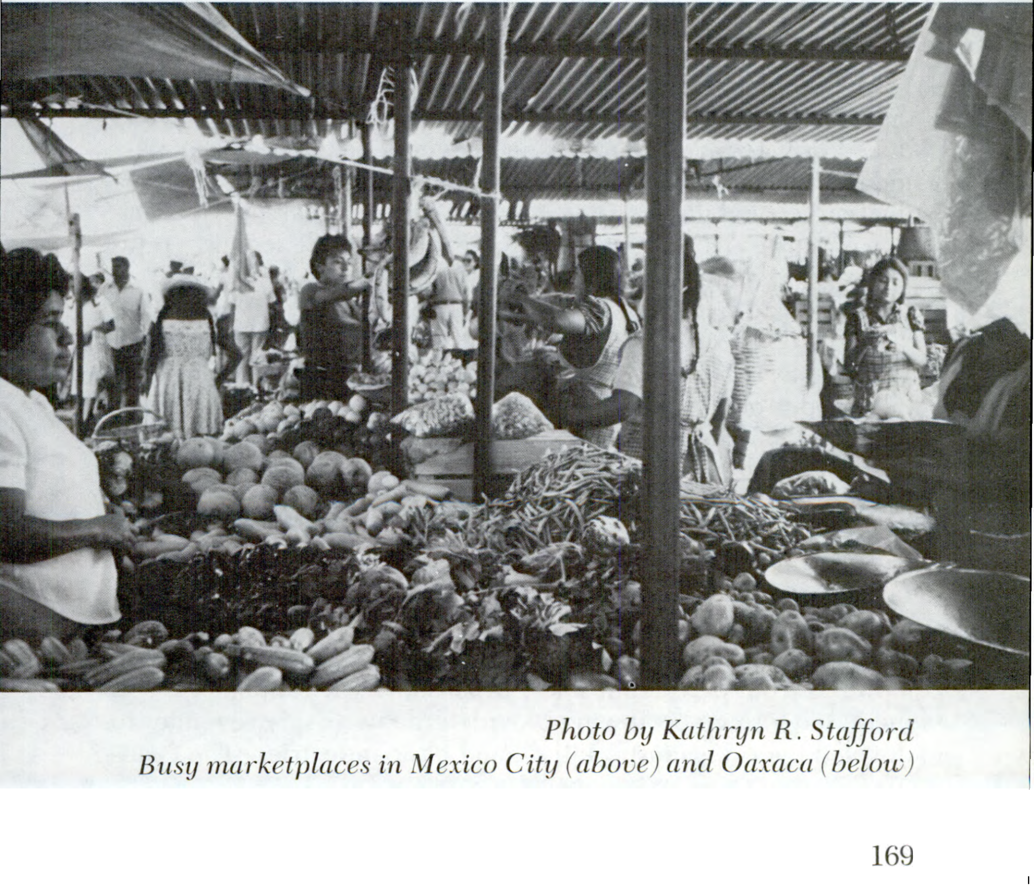

Photo by Kathryn R. Stafford
Busy marketplaces in Mexico City (above) and Oaxaca (below)

Mexico City during the late 1960s. In agriculture the government promoted the intensive use of fertilizers, insecticides, and improved seeds that had been developed in the so-called Green Revolution. By the late 1960s private investment in agriculture had declined owing to the the uncertainty of land tenure because of land invasions. The production of basic foodstuffs was negatively affected by a government bias that maintained food prices at a low price for urban consumers. Producers switched to the cultivation of commercial crops for export or for industrial use and let the production of basic foodstuffs stagnate.

During the 1970s GDP grew by over 6 percent per year, and population increased by 2.9 percent annually. Economic activity demonstrated wide swings throughout the decade. Agriculture began the period with a 5 percent growth rate in 1970. In 1972 agricultural production declined by 2.6 percent, rose by 3.2 percent in 1974, and then declined by 0.7 percent in 1975 and 0.3 percent in 1976 as demand and population growth outpaced the rate of food production. Growth resumed in 1977 and 1978, but adverse weather in 1979 caused production to decline by 2.5 percent, and 10 million tons of food had to be imported in 1980. Although agricultural production grew by 7 percent in 1980, large quantities of expensive foodstuffs were imported between 1980 and 1984. Manufacturing grew by almost 19 percent in 1970 but grew by only 3.6 percent over the 1975 to 1977 period in response to reduced private investment, rising budget deficits, balance of payments deficits, an overvaluation of the peso, stagnating food production, capital flight, rising inflation, and a 45-percent devaluation of the peso in 1976. Restored business confidence and a reinvigorated economy led to a 9-percent growth rate in manufacturing in 1978, 8.5 percent in 1979, and 5.6 percent in 1980.

The discovery of vast deposits of oil was announced in 1976. During most of the early 1970s Mexico had been a net importer of oil and petroleum products. In 1974 Mexico imported approximately US$300 million worth of oil and petroleum products. In 1976 the announcement that Mexico's proven reserves of oil and natural gas were over 11 billion barrels indicated that Mexico would become a major oil producer. By 1980 potential reserves were estimated to be as high as 250 billion barrels of oil and natural gas equivalents. Beginning in 1977 oil and petrochemicals were the most dynamic growth sectors of the Mexican economy. During the second half of the 1970s the combination of rising earnings from petroleum sales, expansionary fiscal policies, and increased foreign borrowing provided the necessary revenues to develop energy, transportation, and basic industries. The economy responded by recording a growth rate that exceeded 8 percent annually over the 1978–81 period.

The number of import categories that were subject to import controls increased from 20 percent of the total in 1977 to 24 percent in 1979. Tariffs were raised concurrently in order to cushion the shock to domestic import-competing industries arising from import liberalization measures. Non-oil exports suffered from the effects of an overvalued exchange rate, which made exports increasingly uncompetitive in international markets. The exchange rate, which had been maintained at a stable rate of 12.50 pesos to the United States dollar between 1955 and 1976, fell to 15.44 pesos to the dollar in 1976 and to 22.95 pesos per dollar in 1980 (for value of the peso—see Glossary).

Beginning in 1982 Mexico witnessed the worst recession since the Great Depression of 1929. Rising budget deficits, a deteriorating current account, recession in the industrialized countries, a world oil glut, a mounting foreign debt, and declining foreign exchange reserves caused a severe liquidity crisis that prompted the peso to be devalued three times in 1982 and the implementation of drastic austerity measures. Immediate international financial assistance, an agreement with the International Monetary Fund (IMF—see Glossary), two rescheduled debt repayment packages from Mexico's 530 foreign creditor banks, and the successfully met completion of President de la Madrid's austerity targets put Mexico on the road to a sound and viable economic recovery by 1984.

In 1982 and 1983 the agriculture sector was experiencing its own crisis. The Mexican Food System (Sistema Alimentario Mexicano—SAM) was inaugurated in 1980 in an attempt to make the country self-sufficient in basic foods within a five-year period. In spite of massive financial allocations to Mexico's subsistence farmers in rain-fed areas and benevolent weather in 1981, agriculture was decimated by the combined effects of a drought and the severity of the economic recession in 1982. Soon after the inauguration of de la Madrid on December 1, 1982, SAM was canceled. Although huge food imports were required into 1984, improved weather helped agriculture recover its momentum. Notwithstanding the announcement by the administration of José López Portillo y Pacheco (1976–82) that the land reform program had reached its limits owing to the lack of land to redistribute, de la Madrid was committed to continuing the land reform program.

Construction activity declined during 1982 and 1983 by some 15 percent because of the recession. More than 500,000 persons were estimated to have lost their jobs in the labor-intensive construction industry as a result of the abrupt fall in demand for new construction. Construction was expected to resume its growth once the economy resumed its vitality, but it would take a number of years before the almost 13-percent average growth rates of the 1978–80 period could be regained. Manufacturing declined by 3 percent in 1982 and by 8 percent in 1983. Until investment and real incomes improved, manufacturing was expected to remain relatively weak during 1984 unless export demand stimulated an increase in production. Mining declined by 3 percent in 1983 but was expected to increase production once world demand for minerals improved. Transportation and communications declined by about 4 percent in 1982 and 1983 as a result of budgetary restrictions that accompanied the economic crisis.

By the 1980s Mexico had developed an extensive transport network that comprised over 200,000 kilometers of roads, of which 67,000 kilometers were paved, over 80,000 kilometers were rural, and the remainder were state and local unpaved roads (see fig. 8). In addition, about 20,000 kilometers of railroads; some 30 ocean ports (13 served international traffic); about 50 airports capable of handling medium- or large-sized aircraft; and over 20,000 kilometers of pipelines for crude oil, refined products, and natural gas were in service. The government also completed an ambitious container transport system spanning the Isthmus of Tehuantepec between the port of Coatzacoalcos on the Gulf of Mexico and the port of Salina Cruz on the Pacific coast. As of mid-1984, however, this land bridge had not been widely utilized owing to the effects of the world recession in the early 1980s. In Mexico City the Metro subway system was built as a means of alleviating the problems of traffic congestion, and about 3.5 million persons rode the subway each day. Five subway lines were in operation, and two other lines were under construction.

Fiscal Management

Between 1940 and 1970 the public sector of Mexico was the dominant catalyst in promoting economic development. From 1940 to 1958 public sector investments in communications and transportation served to integrate the national economy. During the late 1940s and early 1950s, substantial investments in the agriculture sector developed large-scale irrigation projects. In 1960 public investments were reoriented toward increasing the nation's industrial capacity. At the same time, about one-quarter of public investment was devoted to the creation and improvement

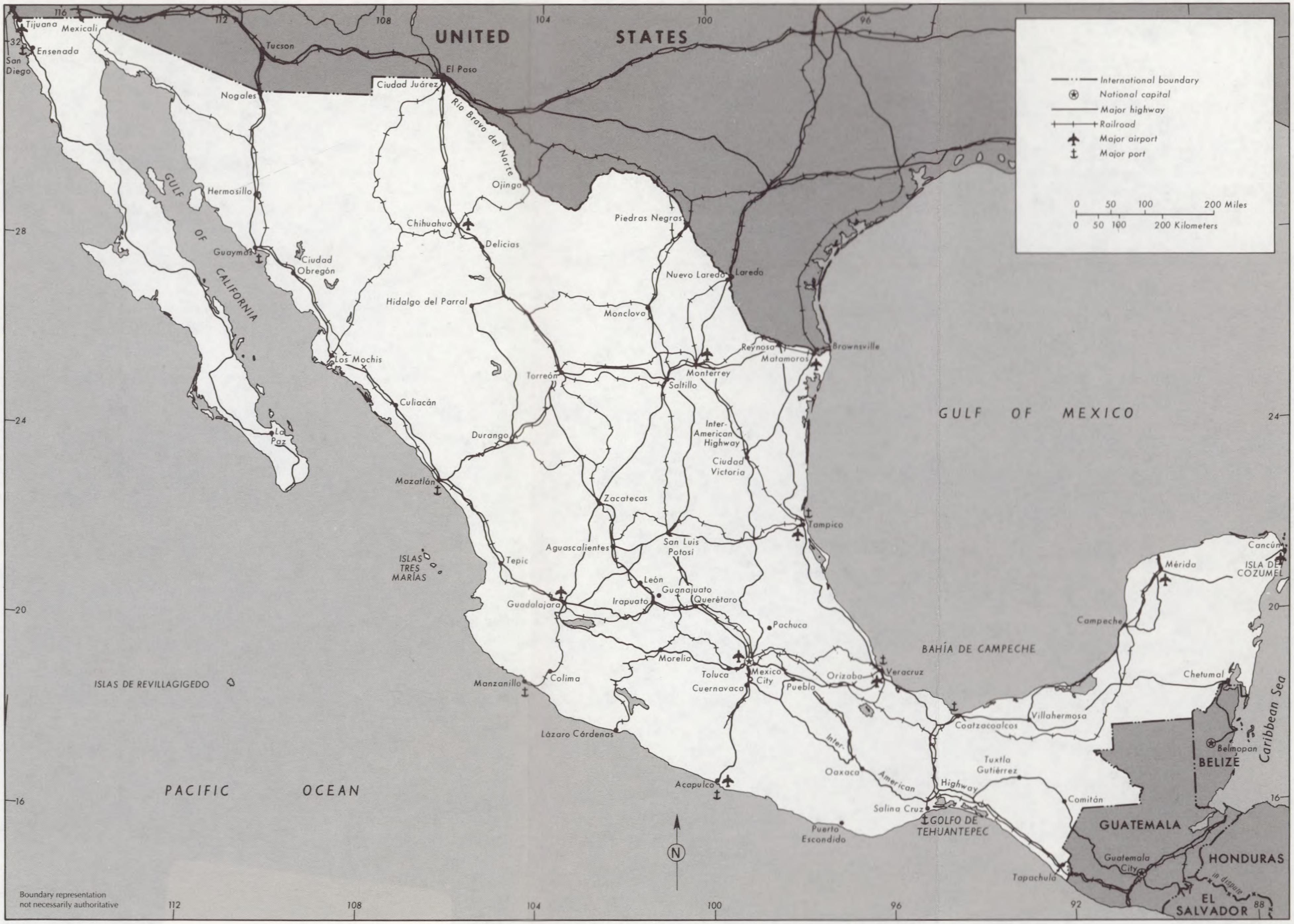
UNITED STATES
Tijuana
Mexicali
San Diego
Ensenada
Tucson
El Paso
Ciudad Juárez
Nogales
Río Bravo del Norte
Ojinaga
Hermosillo
GULF OF CALIFORNIA
Chihuahua
Delicias
Guaymas
Ciudad Obregón
Piedras Negras
Nuevo Laredo
Laredo
Hidalgo del Parral
Monclova
Reynosa
Matamoros
Brownsville
Los Mochis
Monterrey
Torreón
Saltillo
Culiacán
La Paz
Inter-American Highway
Durango
Ciudad Victoria
GULF OF MEXICO
Mazatlán
Zacatecas
Tampico
ISLAS TRES MARÍAS
Aguascalientes
San Luis Potosí
Tepic
León
Guanajuato
Querétaro
Irapuato
Guadalajara
Pachuca
Mérida
Cancún
ISLA DE COZUMEL
Campeche
BAHÍA DE CAMPECHE
Morelia
Mexico City
Toluca
Cuernavaca
Puebla
Orizaba
Veracruz
Chetumal
Manzanillo
Colima
ISLAS DE REVILLAGIGEDO
Coatzacoalcos
Villahermosa
Caribbean Sea
Lázaro Cárdenas
Belmopan
BELIZE
Inter-American Highway
Oaxaca
Tuxtla Gutiérrez
Comitán
PACIFIC OCEAN
Acapulco
Salina Cruz
GOLFO DE TEHUANTEPEC
Puerto Escondido
GUATEMALA
Guatemala City
HONDURAS
in dispute
EL SALVADOR
Tapachula
N
International boundary
National capital
Major highway
Railroad
Major airport
Major port
0 50 100 200 Miles
0 50 100 200 Kilometers
Boundary representation not necessarily authoritative
116
112
108
104
100
96
92
88
32
28
24
20
16

Figure 8. Transportation Network, 1984

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of social infrastructure, such as medical and educational facilities. The lowest level of public investment was geared toward national defense: between 1940 and 1970 only about 2 percent of all public investment was devoted to defense.

By 1970 the government was taking in less revenue than it was spending, and it became necessary to print money and resort to domestic and foreign borrowing to finance a public sector deficit that reached 2 percent of GDP in 1970. The failure to enhance public revenues was largely attributed to government policies that sought to promote private investment through a system of incentives. Low taxation rates on industry and the upper-income groups, ample import controls to protect nascent industries from foreign competition, and subsidized prices served to expand capital accumulation in the private sector at the expense of the public sector's financial solvency.

The low tax burden was even lower than normal because of the inefficient tax collection system and tax evasion. The heaviest tax burden fell on wage earners and the salaried middle classes. They were captives of a tax system that automatically deducted federal taxes from their monthly earnings, while higher salaried professionals whose earnings were not reflected on a regular paycheck and sometimes were deposited in foreign bank accounts could reduce their effective tax rates through evasion. Moreover, federal excise taxes on the consumption of beverages, beer, and tobacco weighed heavily on those persons on the lower rung of the income distribution ladder. In 1980 a value-added tax (VAT) was substituted for the commercial receipts tax on consumption. A federal revenue-sharing program was revised in 1980 to improve on previous tax-sharing arrangements by allocating a greater portion of government revenues to states and municipalities. Moreover, taxes were reduced to where they were more in line with inflationary cost-of-living increases. Taxes, or public nonpetroleum revenue, provided about 12 percent of GDP between 1977 and 1982. Upon assuming the presidency, de la Madrid instituted a comprehensive system of progressive taxation.

Subsidies were another method of stimulating private investment and the development of parastatal (see Glossary) firms. About one-half of all government subsidies were thought to have been used to promote private sector investments. These subsidies increased from 3.7 billion pesos (US$296.2 million) in 1960 to 16 billion pesos (US$1.2 billion) in 1970 and to 428 billion pesos (US$18.6 billion) in 1980. According to the Secretariat of Finance the combined subsidies to parastatal firms and to the private sector amounted to 735.5 billion pesos (US$10.8 billion) in 1982.

In the early 1970s the greatest proportion of total subsidies was directed toward two public enterprises, CONASUPO and the railroad companies. By 1976 these overwhelming shares had declined and subsidies had been redirected to manufacturing and to the electric power sector. In 1977 a large share of public subsidies was utilized to maintain low energy prices for both electricity and petroleum products. Concessionary pricing of electricity and petroleum was regarded as a further instrument of industrial promotion. In addition, the private sector was indirectly subsidized through tax rebates; import tariff exemptions; tax breaks for investments in agriculture, transport, and construction; preferential credit programs; low road-user charges; and low consumption costs at CONASUPO retail outlets.

In 1982 federal subsidies amounted to about 8 percent of GDP. Although public subsidies were provided to CONASUPO, electricity, and the railroads to cover their rising operating losses, hefty subsidies were also provided to the Mexican Fertilizer Company, the social security system, and to the bus and Metro subway system in Mexico City. In addition to federal revenue sharing, other transfers to agriculture for SAM accounted for about 5 percent of GDP. Together with capital expenditures for parastatal firms, these accounted for about one-quarter of the total public sector deficit during the early 1980s.

Over the 1970–76 period, expansionary fiscal policies to stimulate economic growth through social subsidy transfers increased at a higher rate than the inflow of public revenues, and the deficit of the public sector rose from 2 percent of GDP in 1970 to 7 percent in 1976. During the 1960s domestic creditors had provided most of the funds to finance the public sector's borrowing requirements. In the 1970s, however, the government increasingly financed its deficits by borrowing heavily abroad, providing about 32 percent of the financing for the public sector in 1971 and 50 percent in 1977.

Public investment grew from 139 billion pesos (US$6.1 billion) in 1977 to 1,006 billion pesos (US$17.6 billion) in 1982 and was the principal means of spurring economic growth. The four most important areas of public sector investment flows were oil and petrochemicals, agriculture and rural development, transportation, and electricity. As a result of the severe contraction in the economy during 1982 and 1983, public investment expenditures declined by 20 and 40 percent, respectively, in real terms.

Overall, public sector expenditures grew from 583.1 billion pesos (US$25.8 billion) in 1977 to 4,504 billion pesos (US$78.8 billion) in 1982. Public sector income increased from 480.4 billion pesos (US$21.3 billion) in 1977 to 2,844 billion pesos (US$49.7 billion) in 1982. In particular, petroleum revenues provided the largest contribution to public sector income, which rose from 4 to 11 percent of GDP during the 1977–82 period. Thus while public sector income as a percentage of GDP rose from 26 percent in 1977 to 31 percent in 1982, public sector expenditures as a percentage of GDP expanded from 31.5 percent in 1977 to 49 percent in 1982. This imbalance caused the public sector deficit to rise by more than 60 percent annually, from 95 billion pesos (US$4.2 billion) in 1977 to 1,660 billion pesos (US$29 billion) in 1982. The public sector deficit as a percentage of GDP expanded rapidly, from 2 percent in 1970 to 7.5 percent in 1975, then declined to 7.2 percent and 5.1 percent in 1976 and 1977, respectively, as a result of the stabilization program of 1977–78, and continued to climb to 6.5 percent in 1980 before growing in 1981 to 14.5 percent and to almost 18 percent in 1982 during the economic crisis. The government increasingly turned to foreign lenders to finance its growing deficit (see External Debt, this ch.).

The steep rise in the public sector deficit was largely accounted for by the expansion of public sector investment, transfers and subsidies, disappointing non-oil revenue performance, high domestic and international interest rates, and the pursuit of a policy that maintained an overvalued exchange rate to suppress the inflationary effects of excess public spending. On November 10, 1982, Mexico proposed an economic recovery program to the IMF, which committed the country to reducing public sector deficit from 17.9 percent of GDP in 1982 to 8.5 percent in 1983, 5.5 percent in 1984, and 3.5 percent in 1985. Upon assuming office, de la Madrid instituted various corrective measures to reduce the level of public sector expenditures. Several measures were introduced to increase tax revenues. The VAT rate was raised to 15 percent from the previous rate of 10 percent, and the VAT on luxury items was fixed at 20 percent. Tax exemptions that had been provided to gasoline stations, transportation, and wood-using industries were canceled. Moreover, an additional surtax of 10 percent was added to all taxpayers who earned more than five times the national average minimum wage. During de la Madrid's first month in office, prices of gasoline, oil products, and public utilities were raised in order to bring them closer to international market rates. The previous policy of maintaining low interest rates was reversed to reduce capital flight and encourage internal savings. Parastatal firms were streamlined to make them more efficient and financially sound. Public investments were also reduced decisively, and new investments were restrained. The administrative process for planning, implementing, and monitoring public sector investments was to be streamlined and improved. Regional investment was also to be decentralized by providing financial resources directly to the states. Moreover, the Office of the Comptroller General was created in order to oversee investment plans and to audit and control public expenditures more carefully. In 1983 Mexico's public sector deficit was 1,500 billion pesos (US$10 billion), which was slightly less than the 1982 deficit in peso terms but, because of devaluations, was almost a threefold increase in dollar terms (see table 5, Appendix). The public sector deficit declined from almost 18 percent of GDP in 1982 to 8.7 percent in 1983. About 70 percent of the new public sector deficit was financed domestically, and foreign loans financed the remainder.

External Debt

The origins of Mexico's 1982 financial crisis were rooted in government policies initiated in 1978 to promote rapid economic growth and sustained following the second oil price rise in 1979–80. After the initial success of the López Portillo administration in reducing the budget deficit and bringing down the rate of inflation, the discovery of vast oil deposits prompted the government to accelerate economic growth through oil-financed public sector expenditures. Between 1978 and 1981 Mexico's expansionary fiscal policies achieved a real growth rate that averaged over 8 percent, but at the cost of rising public sector deficits, accelerating inflation, and a deteriorating current account that was induced largely by an overvalued peso. At the same time, the prospect of rising oil wealth served as a lever for growth in foreign borrowing.

According to Mexican sources, the annual increase in the public sector foreign debt grew rapidly under the Luis Echeverría Álvarez *sexenio* (six-year term of office) from 12.8 percent in 1970 to 36 percent in 1976. Under López Portillo the growth of foreign borrowing dropped off significantly between 1977 and 1980, from 17 percent to 13.6 percent. In 1981, when the deteriorating economic situation became manifest, the rate of growth of government borrowing quadrupled to almost 57 percent. In 1982 the annual percentage growth in public foreign borrowing declined to 11 percent in response to public expenditure cuts and limited access to foreign borrowing.

Between 1977 and 1980 oil export earnings rose from US$1 billion to US$10 billion, but the balance on current account deteriorated from a US$2 billion deficit to one that reached almost US$8 billion. Consequently, foreign borrowing during 1981 and

1982 was undertaken largely to support the balance of payments. In 1981 the combination of a depressed world oil market, recession in the industrialized countries, a current account deficit that rose to US$13 billion, and higher world interest rates on the external debt caused the public to lose confidence in the peso, and capital flight ensued. In 1981 Mexico's external debt rose by US$24 billion to US$75 billion (see table 6, Appendix). On February 17, 1982, the Bank of Mexico withdrew its support of the overvalued peso and allowed the exchange rate to depreciate from 26.75 pesos to the United States dollar to 45 pesos (see table 7, Appendix). Rather than follow the devaluation with effective corrective measures to resolve the crisis, the government increased wages on March 20 to compensate for the effects of the devaluation. The public doubt of the government's ability to maintain the new exchange rate led to renewed capital flight. On April 20 the government announced a 17-point adjustment program for the economy. The program was never fully implemented, however, and the reduced spending targets were not met, much to the chagrin of the international banking community.

On August 1, 1982, the government decreed a reduction in subsidies that brought increases of 100 percent for the prices of bread and tortillas, 50 percent for gasoline, 30 percent for electricity, 12 percent for natural gas, 50 percent for electricity for industry, and 62 percent for fuel oil for industry. Fear of another wage and price spiral resulted in further capital flight and caused a second devaluation of the peso and the establishment of a dual exchange rate on August 6. A preferential rate of exchange was fixed at 50 pesos per United States dollar (to be used for payments on the external debt and for imports of basic goods) and a free rate at about 79 pesos to the dollar. On August 13, following rumors of impending exchange controls, the government announced that all dollar-denominated accounts held in Mexican banks were being converted to pesos and that the foreign exchange markets were temporarily closed. All precious metal trading was also suspended. These actions had been implemented to counteract a possible run on Mexican-dollar accounts (accounts held in United States dollars by Mexican banks) that would have depleted the Bank of Mexico's foreign currency reserves. Only pesos at a rate of 69.50 to the United States dollar could be withdrawn from the Mexican-dollar accounts.

The response of the international community was immediate. On August 17 the United States and Mexican governments announced a financial assistance package for Mexico that included a

US$1 billion advance payment on oil purchases for the United States Strategic Petroleum Reserve and US$1.7 billion of agricultural credit guarantees under the United States Commodity Credit Corporation's credit guarantee program. In addition, the United States Department of the Treasury arranged a US$700 million currency swap with the Bank of Mexico, and the Geneva-based Bank of International Settlements and the United States government agreed to provide a US$1.8 billion bridging loan until an assistance package under the auspices of the IMF could be arranged. Major foreign creditor banks also concurrently agreed to postpone Mexico's debt repayments for a three-month period.

On September 1, 1982, in López Portillo's sixth and last state of the nation address, he surprisingly announced the nationalization of Mexico's private banks and the imposition of comprehensive exchange controls. The imposition of exchange controls was made with the intent of preventing the movement of internal savings out of the country. Nevertheless, capital flight increased following the announcement. By the time of the inauguration of de la Madrid on December 1, 1982, Mexico was embarked on its worst recession since the Great Depression. Inflation had risen to 99 percent, unemployment was increasing, and the country's foreign reserves, including gold, were down to US$800 million, or three weeks' worth of imports.

On December 23, 1982, a three-year IMF stabilization package was signed with the Mexican government and ratified by the Board of Governors of the IMF. The rescue package required the government to reduce the public sector deficit from 18 percent of GDP in 1982 to 8.5 percent in 1983, 5.5 percent in 1984, and 3.5 percent in 1985; to restrain wage increases; to lower sharply the rate of inflation; to cut back foreign borrowing; to build up foreign exchange reserves to at least US$2 billion; to establish ceilings on internal borrowings and raise domestic interest rates; and gradually to phase out the country's dual exchange rate system. The adoption of these corrective measures enabled the Mexican government to draw on a US$3.9 billion loan arranged by the IMF and to gain access to a US$5 billion foreign bank loan that was linked to the IMF recovery program.

On December 20, 1982, all previous exchange controls were abolished, a revised dual exchange rate system was officially introduced, and the peso was devalued for the third time that year. A controlled rate was originally set at 95 pesos to the United States dollar, but subsequently it depreciated according to a schedule established by the Bank of Mexico of 13 centavos (100 centavos equal one peso) per day and reached 141.98 pesos to the dollar by the end of 1983. The lower controlled rate was used for the payment of principal and interest on the public sector external debt, for interest on the private sector debt, and for approved imports. The free rate was set by the Bank of Mexico. It averaged about 149 pesos to the United States dollar throughout 1983, but after September 23, 1983, was also allowed to depreciate by 13 centavos per day. At the end of 1983, the free exchange rate stood at 159.27 pesos to the dollar. On March 14, 1983, the Bank of Mexico had abolished the special rate that had been retained for conversion of Mexican-dollar accounts (accounts in United States dollars held by Mexicans in Mexico) to pesos. The special rate had initially been set at 70 pesos to the dollar but depreciated by 14 centavos per day and ended at 81.76 pesos to the dollar.

According to the Mexican Secretariat of Finance, Mexico's total external debt was about US$85 billion at the end of 1982. Of this total, about US$59 billion was owed by the public sector, US$18 billion by the private sector, and US$8 billion by the banks that had been recently nationalized.

During 1983 the government created a trust fund within the Bank of Mexico for the coverage of changes in the exchange rate. The objective of this measure was to assist the private sector to meet its debt payments (which were in arrears) to foreign suppliers, thus providing a structure for refinancing private sector debt and insuring the debtors against fluctuating exchange rates. In 1983 some US$200 million out of the US$500 million in suppliers' credits that had been identified were settled, and outstanding balances were due to be paid during 1984. By the time the trust fund was ended in November 1983, about US$11.6 billion of private external obligations had been registered under various repayment plans.

By the end of 1983 some US$23 billion of public sector short- and medium-term debt had been restructured. This debt had been owed to foreign commercial banks and would have fallen due between August 1982 and December 1984. The loans were restructured over an eight-year period, which was composed of a four-year grace period followed by a four-year amortization period. Interest rates were set at 1.875 percent over the London Inter-Bank Offer Rate (LIBOR) equal to 1.75 percent over the United States prime rate.

At the end of 1983 Mexico's external debt totaled almost US$87 billion. An estimated US$61 billion was owed by the public sector, US$18 billion by the private sector, and about US$8 billion was owed by the nationalized commercial banks.

The debt restructuring that occurred during 1983 had important implications for Mexico's future financial requirements. Although the rescheduled debt reduced the public sector's amortization payments on the external debt from US$9 billion to US$1.5 billion in 1983, the restructured payments that would have come due in 1987 and 1988 were about US$12 billion and US$11 billion, respectively (see table 8, Appendix). The magnitude of these payments would have required additional foreign borrowing or a renegotiation of the debt.

During 1984 a substantial commercial loan of US$3.8 billion was arranged with lower interest rates of 1.5 percent over LIBOR, equal to 1.12 percent over the United States prime rate. The loan was arranged for a 10-year period with a six-year grace period on principal repayments. In addition, a new US$390 million loan in agricultural commodity credits would be provided to Mexico, and the United States Export-Import Bank issued a US$500 million credit line.

In the second half of 1984 Mexico's debt was in the process of being rescheduled once again. The outlines of the US$48.7 billion multiyear debt rescheduling package marked a new and sober approach to the debt problems of the developing countries and signaled an end to the short-term nature of recent debt crisis management. The debt was rescheduled over a long maturity period of 14 years with low repayment margins of only 1.1 percent over money market rates during that period. In effect, this eliminated the large debt repayments that would have come due in 1987 and 1988, which were reduced to US$1.9 billion and US$2.4 billion, respectively. The US$23 billion worth of loans that had been rescheduled in 1983 were to be repackaged into a new loan in 1987 and 1988. The terms of the rescheduling also enabled non-United States banks to switch a portion of their loans to Mexico from dollars to other international currencies. As long as the United States dollar does not fall substantially, this creative innovation would provide large savings on interest payments to Mexico, because the interest payments would not be pegged to the United States prime rate but to lower interest rates in the creditor countries.

Moreover, the long 14-year rescheduling period on debt repayments would sever the relationship between the IMF and creditor banks that made commercial lending conditional on the acceptance of the IMF economic stabilization program by debtor countries. The IMF's role was only to provide short-term assistance to countries undergoing balance of payments problems, and its assistance to Mexico was scheduled to end in 1985. Consequently, the foreign creditor banks would have access to the IMF's confidential reports on the performance of the Mexican

Street vendor, Mexico City
Photo by Arturo Salinas

economy, and in the eventuality that Mexico failed to meet its economic targets, the banks would have the right to refuse any further assistance. In September 1984 the 13-member bank advisory committee endorsed this new rescheduling package pending confirmation from the other 550 foreign creditor banks.

Labor Force

In 1983 the labor force was estimated to number 22.4 million, of which about 77 percent were men and 23 percent were women. Over the 1970–80 period, the total labor force grew at a rate of 4 percent annually. It was expected to grow by about the same rate during the 1980s because of earlier high birth rates and a rising labor force participation rate. Approximately 46.2 percent of the economically active population (total population aged 12 and over) of 48.5 million persons participated in the labor force in 1983. The participation rate for men was about 71 percent; for women it was only about 22 percent. Although participation rates for men would continue to rise in the future, rates for women were expected to increase at a faster pace. Expected higher secondary school enrollments among women would delay their entry into the labor force, but higher educational attainment rates would also induce a larger number of women in their early twenties to enter the labor force. At the same time, anticipated reduced fertility rates would allow women to reenter or remain in the labor force for longer periods of time. This trend was expected to become more pronounced as the cultural restraints to rising female participation in the labor force decline.

A number of significant shifts occurred in the distribution of the labor force between 1960 and 1980. Employment in the agricultural sector declined from 54 percent to 32 percent of the total. A modest gain occurred in manufacturing, which increased from 15 to almost 19 percent. Services demonstrated an impressive gain from 13.5 to 30 percent, and construction increased from 3.6 to 5 percent over the period. Mining remained at about 1.3 percent, while transportation and communications rose from about 3 to 4.8 percent. By 1983 the agricultural sector was estimated to have declined to about 30 percent, or to some 6.6 million persons. Employment in manufacturing fell by about 13 percent between 1980 and 1983. The service sector increased to 32 percent of total employment, while the remaining sectors held steady with about the same employment shares as in 1980.

According to Mexican government data, the unemployment rate was about 13 percent in 1983, and underemployment affected an additional 40 percent of the labor force. The actual number of people employed was estimated to have declined by 1.6 million in 1983. Underemployment, or underutilization of labor, was particularly acute in agriculture because of the lack of rural employment opportunities and the seasonal nature of farming. Rural-to-urban migration has swollen the ranks of the marginally employed and the unemployed in the larger urban centers. A number of these migrants eked out an existence in service jobs as street vendors or peddlers until the prospect of better employment opportunities became available. Others increasingly migrated surreptitiously to the United States in search of employment and improved wages.

The prospects for improving employment opportunities would remain a formidable task in the future. In the past the Mexican economy had been unable to generate a sufficient number of jobs to keep pace with the number of entrants into the labor force. At the height of the oil boom years, 1978–81, the Mexican economy grew by more than 8 percent per year, while the labor force was expanding by 3.5 percent. Although 800,000 new jobs were created in 1980 through heavy foreign borrowing and public spending, previously the number of jobs that had been created was only about 350,000 per year, in comparison with about 700,000 new entrants to the labor force. The government hoped to achieve a real growth in GDP of about 6 percent by 1985, but the labor force was projected to rise by 3.5 percent annually between 1980 and 1990. This implied that the number of new entrants into the labor force would be about 800,000 persons per year. The demographic effects of population momentum would continue to exacerbate this situation in the future.

About 43 percent of Mexico's inhabitants were estimated to be under the age of 15 in 1984. This meant that the number of young persons who would be moving into their economically active ages during the next few years would exceed the number of persons leaving the labor force by a factor of two or three. Moreover, even if fertility rates were to decline drastically during the late 1980s and the 1990s, the population would continue to grow well into the twenty-first century because of the large number of future births to the female children of 1984. Thus, the large number of young persons entering the labor force in search of employment could be expected to continue for the near future, even with the dramatic decrease in Mexico's population growth rate.

Mexico's first labor legislation was enacted in 1931 based on Article 123 of the Constitution of 1917. The labor law in effect in 1984 was the Federal Labor Act of 1970, which authorized the government to regulate all labor contracts, minimum wages, hours of work, legal holidays, paid vacations, employment of women and minors, labor unions, collective bargaining, strikes, occupational hazards, apprenticeships, profit sharing, and conditions of work. In addition, this law created the Secretariat of Labor and Social Welfare.

About 8 million workers were thought to be organized into labor unions in the early 1980s. More than 90 percent of all production workers in establishments over 25 employees were unionized. White-collar workers in the private sector did not generally join unions. The Confederation of Mexican Workers (Confederación Trabajadores Mexicanos—CTM) was the leading trade union confederation and included over one-half of all union members in Mexico. Fidel Velásquez remained the longtime secretary general of the CTM in 1984. There were also numerous other groups within the Mexican trade union movement that expressed varying points of view (see Labor Groups, ch. 4).

Industry

Petroleum

During the 1980s Mexico was the fourth largest producer of crude oil in the world after the Soviet Union, Saudi Arabia, and the United States. In 1983 Mexico's oil industry was adversely affected by a slack world oil market and the shrinkage of the domestic economy. Crude oil production declined by 2.9 percent, from 2.7 million barrels per day (bpd) in 1982 to 2.6 million bpd in 1983. The production of natural gas declined by 4.5 percent, from 4.2 to 4 billion cubic feet per day during the same period (see table 9, Appendix). Mexico's oil refineries processed 1.26 million bpd in 1983, an expansion of about 0.8 percent over 1982 levels (see table 10, Appendix). Exports of crude oil accounted for about 75 percent of Mexico's total merchandise exports (see table 11, Appendix). In 1983 petroleum exports increased in volume by 3 percent over the previous year to 1.5 million bpd but declined in value by 5 percent. The total value of petroleum exports, including natural gas and petroleum products, declined from US$16.5 billion in 1982 to US$16 billion in 1983. Mexico's output of crude oil in 1983 was exported to 23 countries. The United States was Mexico's largest customer, purchasing about one-half of Mexico's oil exports. Spain purchased about 10.5 percent, Japan 7.8 percent, Britain 5.6 percent, and France 5.4 percent. Forty-four percent of crude oil exports were light-grade Isthmus and 56 percent were heavier grade Maya crude. According to the Mexican government, the country's proven oil and natural gas equivalent reserves increased modestly from 72 to 72.5 billion barrels from 1982 to 1983.

Mexico's oil industry accounted for 5 percent of GDP in 1983. It was largely managed by the Mexican Petroleum Company(Petróleos Mexicanos—PEMEX). In 1983 PEMEX revenues contributed over 30 percent of the total public revenue, and more than one-third of all public investment was made by the petroleum sector. As a result of the domestic recession, PEMEX focused on maintaining productive capacity over previous plans to expand its operations. Domestic consumption of oil and petroleum products fell by about 14 percent in 1983 from 1982 levels owing to dampened domestic economic activity and to substantial price hikes for petroleum products, which were part of the economic adjustment program. Mexico subsequently adhered to a pricing policy that adjusted its domestic gasoline prices to within 80 percent of United States prices. Between April 1982 and the end of 1983, the price of regular gasoline increased by 200 percent, unleaded by 176 percent, and diesel fuel by 216 percent.

The history of oil exploitation in Mexico began during the dictatorship of Díaz, when foreign companies were encouraged to participate in the country's economic development. Exploration commenced during the latter part of the nineteenth century, and the first commercial production of crude came on line in 1901. In 1911 Mexico exported its first shipment of oil abroad. Oil activities, however, were overshadowed by the explosion of the Mexican Revolution in 1910 (see The Railroad, Mining, and Oil Industries, ch. 1).

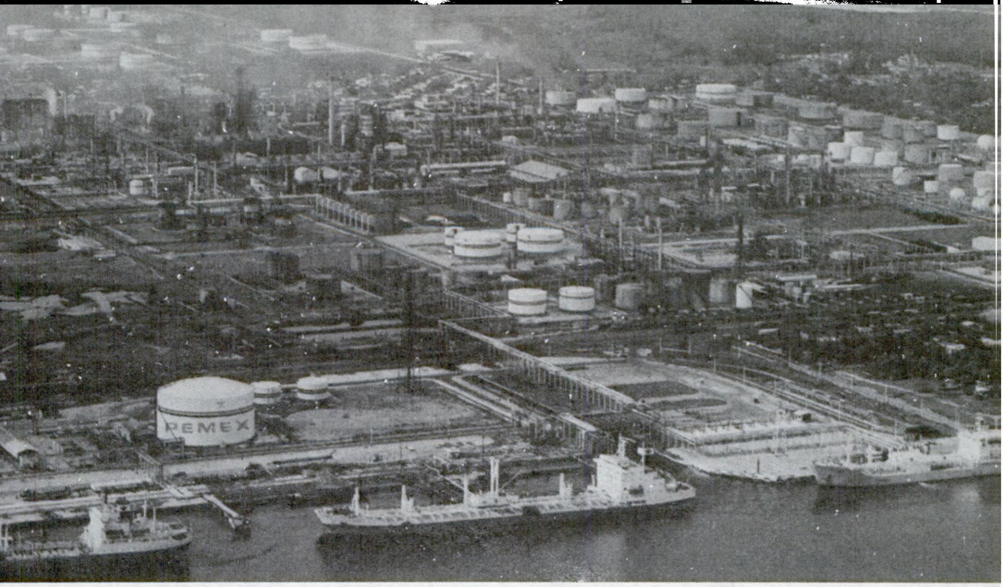
The next stage in the development of oil opened with the Constitution of 1917, in which Article 27 vested the government with permanent and inalienable rights over all subsoil resources. This set the stage for a dispute between the government and the foreign oil companies over the ownership of oil resources that was not to be resolved until the 1940s. Mexico rested its case on the precedent of Spanish law, which provided for public ownership of all subsoil resources. The United States perceived Mexico as being too nationalistic in light of the strategic importance of Mexico's oil production to the World War I effort. In 1923 Mexico and the United States signed the Bucarelli Agreements, which committed both countries to regard the oil companies' titles as concessions rather than outright ownership claims. In 1925 President Plutarco Elías Calles issued a petroleum law that required foreign oil companies to register their titles in Mexico and limited their concessions to a period of 50 years (see The Constructive Phase, ch. 1). The law was eventually revised but, in any event, the discovery of significant oil fields in Venezuela in the 1920s and in the Middle East during the 1930s shifted the oil companies' attention toward these newer and cheaper sources of crude oil. Mexico's production of oil peaked in 1921 at 193 million barrels, which represented over one-quarter of the world's production and made the country the second largest producer after the United States. Mexico was also the world's largest exporter of oil at that time; most of these exports went to the United States. Although oil was increasingly important during the 1920s, coal remained the primary source of domestic energy consumption.

Mexico's decision to expropriate the oil industry as a result of a labor dispute in 1938 marked the next phase of the country's oil history. President Lázaro Cárdenas expressed his intention of adhering to the precepts of the Constitution of 1917, which stipuulated that foreign-owned companies that had been nationalized would be compensated for their losses. The United States oil companies, however, sought to make an example of Mexico so that other countries would refrain from similar nationalizations and pressured the United States government to boycott Mexican silver, oil products, and other export products. Although the boycott briefly went into effect, United States president Franklin D. Roosevelt's Good Neighbor Policy and United States security interests during World War II made the United States government decide to pressure the oil companies into reaching an agreement with Mexico over compensation. In 1943 an agreement was reached between the two parties that provided US$23.9 million (only a fraction of the book value) as compensation to the companies (see The Constructive, Phase, ch. 1).

Between 1938 and 1971 oil production expanded from 44 million to 306 million barrels, an average of 6 percent per annum. In the aftermath of World War II, Mexico discovered natural gas fields near the Texas border and, in combination with the steady increase of oil production, sufficient supplies of oil and natural gas were available to satisfy the country's domestic energy requirements. Between 1940 and the early 1970s, Mexico supplied about 90 percent of its total domestic energy needs as part of an ambitious industrialization program. Domestic demand doubled about every 10 years during that period, and imports became necessary during the late 1960s and the early 1970s. Consequently, Mexico was forced to import oil when the world oil crisis hit in 1973 and oil prices skyrocketed.

Under the administrations of Gustavo Díaz Ordaz (1964–70) and Luis Echeverría Álvarez (1970–76), explorations for additional sources of oil and natural gas continued. During Echeverría's state of the nation address in 1973, he mentioned that Mexico had made an important oil discovery in the southern part of the country. It was not until the accession to the presidency of López Portillo in 1976, however, that the government announced that Mexico's proven reserves of hydrocarbons had jumped to 11 billion barrels. (Hydrocarbon reserves include petroleum and its equivalent in both dry and liquid natural gas.) In the subsequent eight years, Mexico's proven reserves increased by almost 560 percent. In 1977 the government announced that they stood at 16 billion barrels. In 1978 they rose to 20.2 billion barrels and subsequently to 40.1 billion barrels in 1979, 72 billion barrels in 1981, and 72.5 billion barrels in 1983.

In addition, PEMEX believed that Mexico had about 59 billion barrels of probable reserves and another 250 billion barrels of



Courtesy Embassy of Mexico, Washington

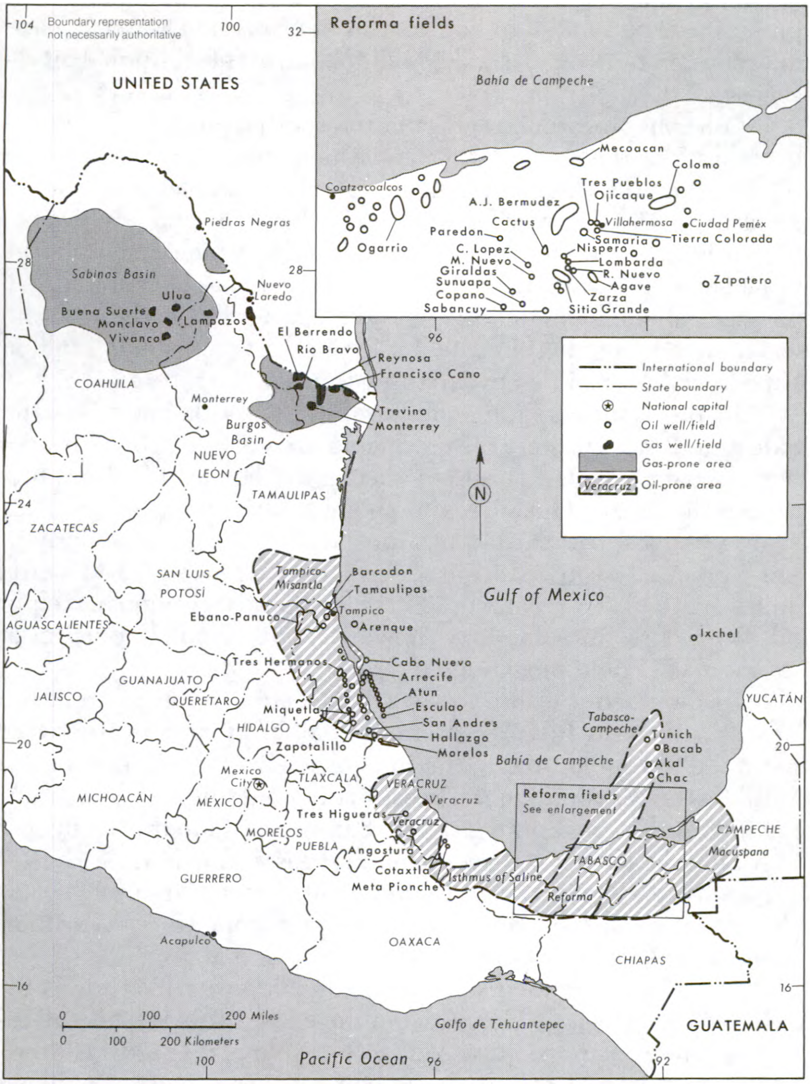
PEMEX refinery
on Gulf of Mexico (above)
and headquarters
in Mexico City (below)

Photo by Arturo Salinas

potential reserves in 1983. PEMEX estimated that Mexico's hydrocarbon reserves were composed of 73 percent crude oil, 5 percent natural gas liquids, and 22 percent dry natural gas. There was considerable speculation at that time that Mexico's official reserve estimates were inflated from 18 to 50 percent, since several fields in Chiapas and Tabasco had not yielded according to expectations. In 1984 the British Petroleum Company estimated that Mexico's proven oil reserves at the end of 1983 were 48 billion barrels and that the reserves-to-production ratio, or the amount of time that present reserves would last at current rates of production, was 45.7 years, or until the year 2030. In 1983 Mexico ranked fourth in the world, in terms of proven reserves, after Saudi Arabia, Kuwait, and Iran.

PEMEX claimed in the early 1980s that only 10 percent of Mexico's area with potential for producing oil had been explored. Moreover, according to their estimates, an additional 70 percent of their land surface and offshore areas held potential reserves of oil and natural gas. At that time, however, three principal geographic areas delineated Mexico's oil and natural gas operations. The central area included the Tampico-Misantla basin and the Chicontepec basin in the state of Veracruz. In the south were the Macuspana basin, the offshore Tabasco-Campeche basin, the Tabasco-Chiapas area, the continental shelf of the Bahía de Campeche, and the onshore Reforma fields that included the Isthmus of Saline basin. In the northern region, hydrocarbon reserves were located primarily in the Sabinas basin and the Burgos basin gas fields (see fig. 9).

The area off the coast of Campeche accounted for about 62 percent of Mexico's total oil and 22 percent of total natural gas production in 1980. The reserves in Campeche accounted for almost one-half of the country's proven reserves (see table 12, Appendix). The production area included about 7,000 square kilometers of oil-bearing deposits, and it was estimated that it could extend for an additional 5,000 square kilometers. In 1982 two significant oil discoveries were made in the Bahía de Campeche, of which the Chuc-1 oil well was estimated to have a daily production rate of 50,000 barrels. The second most active area was the Tabasco-Chiapas area, which encompassed 7,000 square kilometers and produced over 1 million bpd. Total recoverable reserves were estimated at 1.5 billion barrels. The first gigantic discovery of oil in Mexico was made in the Tabasco-Chiapas area at the A.J. Bermudez, Cactus, and Sitio Grande fields in 1972. Its estimated recoverable reserves were 6.5 billion barrels of oil. The Reforma fields are located in the border regions of Tabasco-


104
Boundary representation not necessarily authoritative
100
32
UNITED STATES
Reforma fields
Bahía de Campeche
Mecoacan
Colomo
Coatzacoalcos
Tres Pueblos
Ojicaque
A.J. Bermudez
Cactus
Villahermosa
Ciudad Pemex
Paredon
Samaria
Tierra Colorada
Ogarrio
C. Lopez
Nispero
M. Nuevo
Lombarda
Giraldas
R. Nuevo
Sunuapa
Agave
Zapatero
Copano
Zarza
Sabancuy
Sitio Grande
96
Piedras Negras
28
Sabinas Basin
Ulua
Buena Suerte
Monclavo
Lampazos
Vivanco
Nuevo Laredo
El Berrendo
Rio Bravo
Reynosa
Francisco Cano
Trevino
Monterrey
COAHUILA
Monterrey
Burgos Basin
NUEVO LEÓN
TAMAULIPAS
International boundary
State boundary
National capital
Oil well/field
Gas well/field
Gas-prone area
Veracruz
Oil-prone area
N
24
ZACATECAS
SAN LUIS POTOSÍ
Tampico-Misantla
Barcodon
Tamaulipas
Tampico
Gulf of Mexico
Ebano-Panuco
Arenque
Ixchel
AGUASCALIENTES
Tres Hermanos
Cabo Nuevo
Arrecife
GUANAJUATO
Atun
JALISCO
QUERETARO
YUCATÁN
Miquetla
Esculao
San Andres
Tabasco-Campeche
HIDALGO
Hallazgo
Tunich
20
Zapotalillo
Morelos
Bahía de Campeche
Bacab
Akal
Mexico City
TLAXCALA
Chac
VERACRUZ
MICHOACÁN
MÉXICO
Veracruz
Reforma fields
See enlargement
Tres Higueras
Veracruz
MORELOS
CAMPECHE
PUEBLA
Macuspana
Angostura
TABASCO
Cotaxtla
Isthmus of Saline
GUERRERO
Meta Pionche
Reforma
Acapulco
OAXACA
CHIAPAS
16
0
100
200 Miles
0
100
200 Kilometers
Golfo de Tehuantepec
GUATEMALA
100
Pacific Ocean
96
92

Source: Based on information from United States, Congress, 95th, 2d Session, Joint Committee, Senate, Committee on Foreign Relations and Joint Economic Committee, *Mexico's Oil and Gas Policy: An Analysis*, Washington, 1979, 12; and David F. Ronfeldt, Richard Nehring, and Arturo Gandara, *Mexico's Petroleum and U.S. Policy: Implications for the 1980s*, Santa Monica, 1980.

Figure 9. Oil and Gas Fields, 1980

Chiapas and Campeche and held about 11 billion barrels of proven reserves and 3 billion barrels of probable reserves. They may contain between 16 and 28 billion barrels of additional oil reserves.

Other hydrocarbon regions in the south included the Macuspana basin in the state of Yucatán, which encompass the Yucatan platform and the Chiapas Highland. The Yucatan platform held little prospects for discovering oil, but the Chiapas Highlands held potential because of the geological formations, which resemble the Canadian and Wyoming thrust belts where oil has been found. Oil seeps are abundant in this area, but the geology is complicated, and exploration would be difficult. Its 1984 reserves of about 4 billion barrels could expand by two to three times in the future.

In the central region, the Tampico-Misantla basin was the oldest and most prolific oil-producing area of Mexico. This area was known as the Golden Lane during the heyday of oil production in the 1920s. Onshore, the area was largely played out, but some potential still existed offshore in the 1980s, particularly in the Veracruz basin. Chicontepec, bordering Tampico-Misantla on the west, also was estimated to hold about 100 billion barrels of oil. With current technology, however, only about 10 percent of the reserves could be extracted.

In the north the Burgos basin is located to the south of the Texas Gulf coast. In 1975 about one-half of Mexico's reserves of natural gas were located in the Reynosa field in the Burgos basin. With further exploration it was estimated that this area could double its reserves of natural gas. The Sabinas basin to the northwest may hold the largest reserves of natural gas in North America. Reserves were estimated at 7.1 trillion cubic feet of natural gas, although some argued that they may hold from 18 to 53 trillion cubic feet of additional reserves.

In the wake of the discovery of large deposits of oil and natural gas along Mexico's Gulf coast in the early 1970s, a national debate ensued on how these valuable resources would be used. Moderates argued that hydrocarbon resources were a national treasure that should be husbanded. Although oil would help resolve some of the country's short-term economic problems, they argued, Mexico should not embark on an "all-out" policy of oil production that would only risk the depletion of these resources. Rather, oil was seen as the instrument that would give Mexico time to resolve some of its longer term structural problems while developing alternative energy sources. Another faction of policymakers viewed rapid oil production and export as the country's "way out" of a series of crushing development problems (see

Forces of Change: Three Development Experiences, ch. 2).

In 1979 Mexico unveiled the Industrial Development Plan, which envisioned that oil output would stabilize at 2.25 million bpd by the end of 1980 and that any future increments in production would only serve to compensate for the growth of domestic demand. Exports were scheduled to rise from 1.1 million to 1.3 million bpd by 1982 in order to finance the objectives of the plan. In effect, the Industrial Development Plan demonstrated the government's commitment to maintaining an output ceiling and rallied the divergent factions behind the government.

In fact, the oil production target of 2.25 million bpd was achieved two years ahead of schedule, and the production platform was raised to 2.75 million bpd in 1980, of which 1.5 million were for export. In November 1980 this new ceiling was made official when the National Energy Plan was introduced. That sectoral blueprint proposed to raise the ceiling in order to cool down the economy and finance the country's ballooning import bill that had aggravated the nation's balance of payments deficit. Moreover, exports were limited to 50 percent of domestic output, and no more than one-half of oil exports could be sold to a single country. At the same time, natural gas exports to the United States were frozen at 300 million cubic feet annually. The intention of limiting half of its oil exports to a single country was apparently to forestall United States dependence on Mexico's oil, which many feared could lead to intervention in the event of another oil crisis. Between 1974 and 1979 more than four-fifths of Mexico's oil exports had gone to the United States. By 1981 Mexico had attained its goal as oil exports to the United States declined to 50 percent. In the midst of the economic crisis of 1982, however, the two countries reached an agreement to sell greater quantities of oil to the United States at preferential rates.

Mexico began 1981 with an optimistic outlook. International oil prices had risen to US$36 per barrel, oil exports increased by 61 percent during the first five months of the year over the same period in 1980, and oil revenues doubled to US$6.4 billion. By midyear, however, it had become clear that an oil glut existed in the international market.

Several factors accounted for the world oil glut. Mexico and other oil exporters not associated with the Organization of Petroleum Exporting Countries (OPEC) had expanded their exports to take advantage of favorable world prices, and Saudi Arabia had increased oil production to a record level of 10.3 million bpd. Energy conservation and economic stagnation in the industrialized nations combined to form a 2 million to 3 million bpd excess supply of oil worldwide. Meanwhile, OPEC members met to discuss the prospects of maintaining oil prices at their 1981 levels and reducing output by 10 percent. Saudi Arabia, however, elected to continue its oil output levels and keep its selling price for a barrel of oil at US$32.

In the face of declining OPEC prices, Jorge Díaz Serrano, then director general of PEMEX, made the decision in 1981 to follow OPEC's lead by reducing Mexico's price per barrel from US$36 to US$32. Although Mexico was not a member of OPEC, it had tended to keep its prices in line with OPEC trends since 1976. For a number of reasons, Díaz Serrano's opponents forced his resignation in mid-1981, and the price was promptly restored to US$36 per barrel (US$38.50 for Isthmus crude and US$34.50 for Maya crude). This maneuver failed to consider the opposition that an oil price hike would engender among Mexico's major clients. France and several United States companies canceled their purchase contracts, and Mexico's oil exports plummeted to less than 1 million bpd. This situation was not reversed until February 1982, when Mexico reduced its average price per barrel to US$28.75, or US$32.50 for Isthmus crude and US$25 for Maya crude. In February 1983 Isthmus crude prices declined to US$29, and Maya crude declined to US$23. Subsequently, Maya crude prices were increased in August and October of 1983 to US$24 and US$25, respectively. Between early 1981 and the end of 1983, the average price of a barrel of Mexican crude declined by a total of US$9.50; the Isthmus variety declined by 25 percent and Maya by 28 percent.

In mid-1981 United States president Ronald Reagan agreed to purchase 109 million barrels of oil for the Strategic Petroleum Reserve in order to assist Mexico's flagging economy. This reserve had been established with the objective of providing a buffer against short-run disruptions in the supply of oil. In September 1982 an additional sales agreement was concluded for another 40 million barrels for the United States reserve. This agreement formed part of the multibillion dollar rescue package to help Mexico meet its international financial commitments. The United States paid US$1 billion for the oil at a price of US$25 per barrel for Isthmus crude.

At the beginning of 1983 Mexico reduced its price for natural gas from US$4.94 to US$4.40 per thousand cubic feet in response to an oversupply of natural gas in the United States. At the same time, the United States buyers reduced their purchases by 120 million cubic feet per day from the standard ceiling of 300 million that had been set in 1979. These two factors were estimated to have cost

PEMEX about US$169 million in lost earnings during 1983.

Since Mexico nationalized the United States oil interests in the country in 1938, PEMEX has largely been at the helm of the Mexican oil industry. Ultimately it was the president of Mexico who had the final word on how much and in what manner the country intended to use its oil. Over 30 percent of total public funds were invested in PEMEX in order to continue the exploration for additional hydrocarbon reserves, increase its transportation network, improve and modernize Mexico's ports, build new refineries, and develop the petrochemical industry. A substantial portion of PEMEX's investments were dedicated to expanding the country's port capacity. In the early 1980s the most important oil ports included Pajaritos, Ciudad Madero, Tuxpan, and Dos Bocas along the Gulf coast and Rosarito and Salina Cruz on the Pacific side. PEMEX owned and operated a fleet of 34 oil tankers having a capacity of over 6 million barrels. At that time, PEMEX had plans to double the number of tankers by 1990. PEMEX operated about 10 refining plants having a total capacity of about 1.3 million bpd and had plans to expand its oil refining capacity to 2.3 million bpd in 1984 and 3 million by 1990. In addition, PEMEX operated about 30 natural gas processing and gas liquids extraction plants, having capacities of about 3.4 billion cubic feet of dry natural gas and 255,000 bpd of natural gas liquids, respectively. PEMEX also aspired to be a net exporter of petrochemical products in the near future. Several new processing plants were under construction with the objective of increasing Mexico's petrochemical capacity from about 16 million tons per year to over 25 million in the late 1980s.

A number of PEMEX's expansion plans were on hold in 1983 and 1984 as a result of a decline in Mexico's hydrocarbon earnings, which dropped from US$16 billion in 1982 to about US$14.5 billion in 1983. Moreover, PEMEX's 1983 budget allocation declined by 42 percent from the previous year's level to US$6.5 billion.

PEMEX was under the direction of the Secretariat of Energy, Mines, and Parastatal Industry, whose secretary in 1984 was Francisco Labastida Ochoa. Many officials were brought to PEMEX in the early 1980s from other cabinet-level organizations with the objective of improving the organization's managerial capabilities and technical proficiency. The directors of PEMEX and President de la Madrid were committed to eliminating the corruption within the organization that had plagued PEMEX under the previous administration.

Other Minerals

Mexico was an important producer of a number of minerals other than petroleum. It was the world's largest producer in 1983 of silver, arsenic, and fluorite; the second largest producer of celestite and sodium sulfate; the third largest producer of antimony and bismuth; the fourth largest producer of graphite, mercury, and diatomite; and the fifth largest producer of sulfur, lead, zinc, and feldspar (see table 13, Appendix). In all, Mexico produced over 40 different minerals at mines throughout the country. In addition, Mexico exported 12 nonfuel mineral commodities, of which seven were metals and five were nonmetals. In descending order of export volume, these metals included copper, manganese, zinc, lead, tungsten, mercury, and bismuth. The nonmetal category included gypsum, sulfur, fluorite, salt, and cement.

By 1900 silver and gold, which had long been Mexico's most important exports, had been supplanted by other minerals. Until 1930 copper was the most valuable mineral export, followed by lead until 1950 and copper until 1982. In 1983, when silver jumped 77 percent in value and gold rose 28 percent, these precious metals regained their historic lead as Mexico's most valuable nonfuel mineral exports. Other important export money earners in 1983 were copper, zinc, iron, sulfur, molybdenum, fluorite, barite, and coke. In terms of production, the six most important metals were iron, zinc, copper, lead, manganese, and aluminum. The six most important nonmetal minerals were cement, salt, lime, sulfur, silica (in the form of quartz, quartzite, and sand), and fluorite. In addition, coal, coke, and carbon black recorded substantial output levels. In 1983 six minerals increased their output over 1982 levels: silver (by 23.5 percent), lead (14.8 percent), gold (13.5 percent), molybdenum (13 percent), zinc (11 percent), and barite (10.3 percent). Six minerals recorded declines in production, however: manganese (27.4 percent), copper (13.8 percent), sulfur (11.8 percent), fluorite (11.8 percent), iron (1.4 percent), and coke (1 percent).

World demand, and therefore prices, for minerals as a group was very sensitive to national and international economic cycles. In the late 1970s and early 1980s the effects of the worldwide economic recession resulted in a severe contraction in demand for minerals and metals. In spite of the general economic improvement among the industrialized countries during 1983, the recovery was insufficient to compensate for the negative impact of the recession in previous years. In 1983 the international market for minerals and metals was characterized by excess supply and low prices. For example, the prices for copper and lead in constant

1982 dollars were the lowest in 33 years, while zinc recorded the lowest price in 23 years.

Domestically, the effects of the economic recession in 1982 and 1983 depressed industrial output. In particular, the contraction of construction, the automobile industry, oil, and the production of metal parts reduced the demand for coke, iron pellets, steel, and manganese. In 1983 silver production increased in response to a more favorable international price, and companies that mined silver as a by-product from other mineral production operations recorded a profit. During the height of the recession in 1982, record levels of production were achieved for copper, iron, ferroalloys, molybdenum, phosphate, and salt. The level of output for other minerals was largely flat or declined. Notable declines in production were recorded for antimony, bismuth, manganese, crude steel, and lead. Nonmetallic mineral output decreased for fluorite, gypsum, and sulfur.

Most of Mexico's mineral resources were confined to three geographic regions. In the northern region, Baja California and the states of Sonora, Sinaloa, Chihuahua, Coahuila, Nuevo León, Durango, and Zacatecas were the sites of operational mines of copper, coal, gold, iron ore, zinc, lead, silver, molybdenum, salt, phosphate rock, graphite, barite, fluorite, uranium, and tungsten. In the eastern region, the Gulf coastal states of Veracruz, Tabasco, and Campeche produced most of the country's sulfur, aluminum, and manganese. A wide central-western belt that encompassed the states of Jalisco, Guerrero, Aguascalientes, Guanajuato, Hidalgo, and San Luis Potosí produced a substantial proportion of gold, manganese, fluorite, lead, and zinc.

In the early 1980s silver was Mexico's most valuable nonfuel mineral, representing almost one-half of the total value of all nonfuel mineral exports. When the Noria de Angeles mine became operational, silver output in the state of Zacatecas increased by 23 percent in 1983, and Mexico was expected to increase its silver mining capacity from 60 million troy ounces to 75 million troy ounces per year. When operating at full capacity, Noria de Angeles was expected to mine over 10,000 tons per day and produce 7 million troy ounces of silver in lead concentrate. Guanajuato contributed about 4.5 million ounces of silver from the Torres mines. In 1982 Industrias Penoles, the leading producer of silver in Mexico, opened two silver mines in Sonora and Michoacán, which also provided zinc, cadmium, and lead by-products.

Gold output had declined for two decades until production began in 1984 at the new gold deposits at El Barqueño in Jalisco. This mine was expected to increase Mexico's output of gold by about 87 percent over 1983 levels. The Pinzón Dorado mine in the state of Guerrero was the only mine that mined gold exclusively; otherwise, gold was produced primarily as a by-product of lead, zinc, and copper mining. The leading gold-producing states were Guanajuato, Sonora, Durango, Chihuahua, and Zacatecas, which together produced almost 80 percent of the gold in Mexico.

Sonora had the largest deposits of copper in the country and had huge deposits at La Caridad and Cananea mines. Copper reserves at the Cananea deposits were estimated at about 1.8 million tons, while deposits at the La Caridad mine were estimated to hold 680 million tons of copper. Ongoing projects at these two sites were planned to increase the country's annual smelting capacity for copper from about 120,000 to 355,000 tons by the end of construction in 1984. In addition to the copper refinery that was owned and operated by Cobre de México in Mexico City with a capacity of 120,000 tons per year, La Caridad owners built another refinery near the Pacific port of Guaymas that would give Mexico a combined refinery capacity of 33,000 tons per day. These two projects were designed to enable Mexico to export a greater proportion of refined copper rather than relying solely on exports of copper concentrate.

Molybdenum was recovered as a by-product of copper mining in the state of Sonora. The sharp jump in molybdenum output in 1983 to 5,870 tons from only 451 tons in 1981 was a result of the operation of a new 4,500-ton per year molybdenum by-product plant at the La Caridad copper mine. Tungsten was also mined in the state of Sonora at the San Alberto mine, where reserves were estimated at 6 million tons. In 1983 Mexico produced 167,400 tons of lead and 257,400 tons of zinc in the states of Chihuahua and San Luis Potosí. The Real de Angeles silver mine was expected to produce about 31,000 tons of lead annually and about 26,000 tons of zinc per year as by-products. In 1979 three state-controlled steel companies were merged into a holding company, the Mexican Steel Mill (Siderurgica Mexicana—SIDERMEX), which produced about 5.3 million tons of iron ore in 1983. La Perla iron ore mine on the Chihuahua-Coahuila border, Las Encinas mine in Colima, the Águila iron deposit in Michoacán, and Las Hércules mine complex in Coahuila were the principal iron ore producers. Mexico's reserves of iron ore, about 830 million tons in 1983, were sufficient for domestic requirements.

The Tetzintla and Autlán mines in the state of Hidalgo were the largest producers of manganese. Autlán alone had sufficient reserves of manganese ore to last 25 years at 1983 production levels. Moreover, these large deposits may contain enough ore deposits to last for about 150 years. The state of San Luis Potosí produced about one-half of Mexico's flourite, followed by the states of Coahuila, Chihuahua, and Guanajuato. Phosphate for the fertilizer industry and salt were produced in Baja California. The San Juan de la Costa phosphate mine had a capacity of about 720,000 tons annually. There were over 100 small salt producers in Mexico, but the largest was Exportadora del Sal, which had an estimated annual capacity of 6 to 8 million tons.

The state of Veracruz was reported to have about 80 million tons of sulfur deposits and helped make Mexico Latin America's largest sulfur producer. Ninety percent of its 2.4 billion tons of proven coal reserves were located in the state of Coahuila. In addition, Mexico was estimated to have about 150,000 tons of uranium reserves, which were primarily located in the state of Chihuahua. Additional reserves of uranium were reported in Nuevo León, Sonora, Oaxaca, Durango, Sinaloa, and in Baja California. Uranio Mexicano completed its first uranium processing plant in 1982 at Peña Blanca, in the state of Chihuahua, which had the capacity of milling 650 tons of ore per day. In 1984 Mexico was in the process of completing the Laguna Verde I and Laguna Verde II nuclear power plants in the state of Veracruz.

From the Porfiriato until the early 1950s, approximately 95 percent of Mexico's mining industry was foreign owned. By the early 1970s about 90 percent of the country's mining operations had reverted to Mexican ownership. Under the terms of the 1973 Foreign Investment Law, new mining concessions could only be granted to Mexican nationals or to Mexican corporations in which a 51-percent share of the capital stock was held by Mexican nationals. Special mineral concessions could be obtained for certain minerals or in areas that were set aside as part of national mineral reserves as long as 66 percent of the capital stock of the companies involved was Mexican owned. Uranium and other nuclear-energy-producing minerals were exclusively reserved for the government.

Manufacturing

In 1983 the manufacturing sector contributed 22 percent of total GDP. The real rate of growth in manufacturing had declined, however, during 1982 and 1983 by 3 percent and 8 percent, respectively. The severe contraction of economic activity caused a precipitous decline in domestic demand from the high levels of the 1978–81 economic boom years. Output of manufactured products was negatively affected by several internal and external factors that had previously served to stimulate manufacturing activity. Many subsidies were eliminated or reduced during 1983; needed imports of raw materials and capital goods inputs became costlier following the 1982 devaluations; companies with foreign currency-denominated liabilities suffered financial losses because of the devalued peso; foreign exchange became scarce as a result of foreign exchange control; and credit became even more scarce as interest rates remained high. Moreover, the situation was exacerbatd by economic constraints that limited the volume of manufactured exports. The economic boom in the domestic market over the 1978–81 period oriented production internally and reduced the quantity of exportable surpluses. Manufactured products became increasingly uncompetitive as a result of the overvaluation of the peso; moreover, investment in manufacturing activities declined as a result of augmented capital flight, and foreign direct investment declined in response to the uncertain investment climate.

Most manufacturing companies were forced to reorient their business strategies in the face of the grave economic recession and prevailing atmosphere of economic uncertainty. Numerous companies reoriented their production and marketing strategies toward the manufacture of import-competing products for the domestic market. Others turned to exporting in order to take advantage of the 1982 devaluations, which made domestic products more competitive in international markets. At the same time, most companies were forced to streamline their administrative and financial operations. These corrective measures included reducing administrative costs, cutting back nonessential personnel, reducing sales on flexible credit terms, reducing inventories, slowing payments to creditors, and attempting to restructure debts to foreign creditors through the Bank of Mexico's credit and exchange risk program (see Fiscal Management, this ch). Industries that had been affected by the reduction in subsidies sought to obtain government approval for new subsidies on the inputs used in the production process or to reduce production of the goods that were subject to price controls. They also solicited additional financial assistance from the government in order to maintain a constant volume of output or planned to curtail their production of previously subsidized products. In spite of these subsidy-dependent companies' entreaties, the government remained committed to phasing out costly subsidies.

Within the context of a broad-based deterioration of the manufacturing sector, the production of nondurable consumer goods declined by 5 percent in 1983, durable consumer goods declined by 18 percent, intermediate goods declined by 8 percent, and capital goods declined by 26 percent. Within the category of nondurable consumer goods, there occurred a 3 percent decline in foodstuffs, among which dehydrated and condensed milk declined by 24 percent, rice by 15 percent, fish and shellfish by 40 percent, and wheat flour by 4 percent. The production of sugar, however, increased by 15 percent, bread and pastry by 3.5 percent, and tortillas by 4 percent. Beverages fell by 4 percent, of which soft drinks and carbonated beverages declined by 4 percent, beer declined by 19.5 percent, and alcoholic beverages increased by 16 percent. The manufacture of cigarettes fell by 15.5 percent. Textiles declined by 2.5 percent, and clothing declined by 3.5 percent in response to a decline in domestic demand and increased prices.

The fall in consumer durables was primarily determined by the decline in the manufacture of automobiles by 29 percent in 1983 and by 21 percent in 1982. The production of household electrical appliances declined by 17 percent in 1983; radios, television sets, and other electrical appliances fell by 13 percent; and metallic furniture declined by 30 percent.

Output of nonmetallic intermediate products declined by 13 percent, among which hydraulic cement declined by 12 percent; glass products fell by 24 percent; asbestos products dropped by 28 percent; and mosaic tiles fell by 15 percent. The demand for these products declined in response to the 15-percent fall in new construction activity in 1983.

The petrochemical industry expanded its output by 27 percent in 1983 as a result of the opening of five new plants at the mining center at La Cangreja in the state of Veracruz. The manufacture of capital goods registered the sharpest contraction in output within Mexico's industrial sector. Capital goods declined by 26 percent in 1983 and by 15 percent in 1982 as a result of the fall in both public and private investment and because of the limited opportunities to export domestic capital goods, which were noncompetitive in foreign markets. Among the most important capital goods, the manufacture of trucks declined by 60 percent, agricultural machinery fell by 40 percent, and motors and electrical transformers declined by 11 percent.

Production of tires and inner tubes declined by 11 percent, and automobile batteries declined by 29 percent as a result of the fall in the production of automobiles. The production of steel products declined by 25 percent because the economic recession reduced domestic demand. The 1982 devaluations of the Mexican peso made steel products more competitive in foreign markets, while steel imports were drastically curtailed. Mexican exports of steel were valued at US$860 million in 1983 in comparison with 1980, when only US$67 million worth of steel products were exported. Of the 1983 total, approximately US$560 million worth of steel products were exported to the United States.

The in-bond, or *maquiladora* (see Glossary) industry was an important contributor to industrial activity and a leading source of foreign exchange. According to United States trade data, Mexico's *maquiladora* industry earned US$1.1 billion in 1982 and about US$1.4 billion in 1983 as a direct result of sales to the United States market. After the inception of the *maquiladora* program in 1965, assembly operations were initially confined to the border area adjacent to the United States. In 1972 such industries were authorized to operate in the interior of Mexico but were excluded from the industrial centers of Monterrey and Mexico City. The government's objective in authorizing the expansion into the interior of the country was to use the expanded operational base to encourage industrial integration and greater quantities of Mexican inputs in the production process. In 1983 Mexico's *maquiladora* industry consisted of over 600 assembly plants, of which about 90 percent were located along the United States-Mexican border (see Forces of Change: Three Development Experiences, ch. 2).

A majority of the border operations were concentrated in Ciudad Juárez, Tijuana, Mexicali, Nogales, and Matamoros. In the interior, the major concentrations were located in Chihuahua and Guadalajara. *Maquiladora* manufacturing plants were authorized under Mexican law to be 100-percent foreign owned and were required to be incorporated in Mexico and to conform to Mexican law. On average, foreign-owned plants employed between 350 and 500 workers in each plant. In 1983 about 156,000 Mexican workers were employed by the border industries. The majority of the total *maquiladora* assembly operations were Mexican owned, although the larger plants—with the exception of those making textiles—were foreign owned. Inducements offered to *maquiladora* companies included the duty-free entry of all machinery, materials, and equipment needed to establish an assembly operation in Mexico and the subsequent tax-free export of goods processed in Mexico. Excluding textiles and apparel, there were no restrictions on what items a *maquiladora* was allowed to produce for export. Both textiles and apparel were subject to annual United States quotas. In addition, low labor costs enabled Mexico to be highly competitive with wages in East Asia, and *maquiladora* companies based in Mexico were authorized to lease land and plant facilities under a 30-year trust agreement. Moreover, foreign-owned *maquiladora* companies were allowed to reexport their products to the United States without having to pay a duty on the United States-made contents of the products. Duty was only applied on the value added that originated in Mexico.

The main categories of products that were produced by the *maquiladora* plants included electronics, electrical equipment, ceramics, automotive parts, and toys. Foundry and other heavy industrial products were also produced but required higher skilled workers than the average *maquiladora* work force, which normally consisted of females between the ages of 19 and 23.

Since the 1850s foreign investment has played an important role in the development of a viable industrial sector in Mexico. President Benito Juárez attempted to attract foreign investment to help develop the Mexican economy but retained a strong sense of nationalism that protected the country from being dominated by foreign economic interests. Under the turn- of-the-century administration of Díaz, foreign investment was actively encouraged to participate in the development of mining, agriculture, manufacturing, and an adequate infrastructure system. By 1911 foreign investment had reached a total of US$1.4 billion. During the violent phase of the Revolution (1910–17), foreign investment dwindled to a modicum of its previous level. Between 1926 and 1940 foreign investment in the petroleum industry declined, and most large, foreign-owned agricultural investments were expropriated. During World War II little foreign investment entered the country.

In 1944 an emergency decree to prevent a wartime flight of capital was enacted. It represented a precursor of Mexico's later legal constraints on the operation of foreign investment in the country. In 1945 the government established a requirement that limited foreign participation to 49 percent for the radio, film, fishing, advertising, domestic airlines and highway industries. Soon thereafter, the same rule was extended to the bottling and rubber industries.

Over the 1949–57 period, foreign investment renewed its vigorous inflow into the Mexican economy. The largest inflow was concentrated in the manufacturing sector. Thereafter, foreign investment did not grow as rapidly as the growth in foreign borrowing by the public sector. In 1960 the timber industry was reserved for wholly Mexican-owned companies. In 1961 foreign ownership in the mining industry was limited to 49-percent participation and, in the case of several strategic minerals, to 34 percent. In 1965 the Mexican government promulgated a law that limited foreign equity participation in the banking, insurance, and bonding industries. In 1970 tougher restrictions were passed that limited foreign participation in the steel, cement, glass, fertilizer, paper, and aluminum industries. Thus, by the early 1970s, a clear trend could be discerned in the government's efforts to promote the Mexicanization or majority control of investments by Mexican nationals within the industrial sector. Nevertheless, in 1970 almost 2,000 foreign firms were operating in Mexico, including more than 240 subsidiaries of United States-based multinational corporations.

In February 1973 the government passed the Technology Transfer Law with the objective of reducing the industrial sector's dependence on foreign technology. Specifically, the law sought to impose procedural standards and registration requirements on the use of patents, trademarks, technology, and managerial services. The National Registry for the Transfer of Technology within the Secretariat of Energy, Mines, and Parastatal Industry was entrusted with the administrative responsibility of scrutinizing the contracts with foreign firms on the cost and need of technology and ensuring that the local management of the companies employed a maximum number of Mexican nationals.

On March 9, 1973, the Mexican government passed the Law for the Promotion of Mexican Investment and Regulation of Foreign Investment. This law codified many of the existing rules regarding foreign investment and limited such investment in most Mexican companies to a maximum of 49 percent of the capital stock and to a lesser equity participation in the case of industries designated as strategic. The law also regulated contracts regarding the transfer of technology on royalties, patents, trademarks, and know-how. Any qualitative or quantitative expansion, relocation, or new product lines established by existing firms was considered as new investment under this law. In addition, it accorded the Mexican government the sole right to develop petroleum, natural gas, petrochemicals, nuclear-capacity minerals, nuclear energy, electricity, railroads, telegraphic and radio communications, and certain strategic minerals. This law established the National Commission on Foreign Investment, which in 1983 was composed of representatives from the secretariats of commerce and industrial development; energy, mines, and parastatal industry; finance; foreign relations; government; labor and social welfare; and programming and budget. Among its most important responsibilities were screening new investments to determine if the foreign investment would displace national companies that were operating effectively; ensure that areas that were adequately covered by national companies did not receive additional inflows of foreign investment; ensure that the designated areas of foreign investment would have positive balance of payments effects through the expansion of exports; increase domestic employment opportunities; incorporate domestic inputs into its products; and assist the country in the transfer of needed technology to national companies.

In 1976 the Law on Inventions and Trademarks was enacted. This law restricted patents on products such as chemicals, pharmaceuticals, pesticides, and herbicides. Pharmaceutical products and process patents were not recognized by the government; other patents were valid for a 10-year period. In the event that the patents were not exploited during the first three years, the government had the option of reassigning the exploitation rights to another company. The law also stipulated that domestically produced goods must be labeled with a distinctive Mexican trademark, which would not necessarily be linked to the foreign or international trademark.

Upon assuming the presidency in December 1982, de la Madrid publicly expressed an interest in opening the economy to foreign investment. The government was primarily interested in generating new investments in priority industries and developing specific regions of the country as part of the 1983–88 National Development Plan. Foreign investment was encouraged to participate in the development of complex industries that could not otherwise be developed domestically, in industries that require large investments per occupied employee, in industries with the potential for expanding exports, in *maquiladora* assembly plants, in industries that could increase the country's import substitution industrialization efforts, and in small and medium-sized firms using important technology.

Priority industries were divided into two categories. The first included agro-industries and those manufacturing capital goods. The second was composed of nondurable consumer industries producing electric household appliances, certain types of furniture, parts for transportation industries, equipment and parts for certain service industries, intermediate petrochemical and metallurgical products, pharmaceutical products, and construction materials. Priority development zones promoted by the government included seacoasts, ports, and border zones. Both categories were granted special tax credits, which ranged from 10 to 25 percent of federal corporate taxes for majority-owned Mexican companies. The size of the tax exemptions depended on the location of the investment, the kind of industry, the amount of employment generated, the quantity of Mexican-produced machinery and equipment purchased, and the size of the company. Tax credits were granted in the form of "certificates of fiscal promotion" and were valid for five years to be used in lieu of paying most federal taxes. Agriculture, cattle breeding, and fishing activities qualified for a 40-percent reduction of federal income taxes; companies that processed their own products qualified for a 25 percent reduction; and companies that published books qualified for a 50 percent reduction. Construction companies received special tax rates that provided the latitude of paying their regular federal taxes or opting for a flat rate of 3.75 percent of their monthly gross incomes. Strategic sectors, such as mining and petrochemicals, qualified for a 15- to 20-percent tax break if they were located in a priority development region.

In addition, companies establishing new operations or expanding existing facilities by at least 40 percent in the priority development regions received a subsidy of 30 percent on their purchases of basic petroleum products from PEMEX. Moreover, companies that established new manufacturing plants in specific urban areas (excluding Mexico City, Guadalajara, and Monterrey) qualified for a subsidy of 15 percent on their purchases of natural gas. Businesses that agreed to establish new manufacturing operations in certain remote areas of the country qualified for a 30-percent subsidy on purchases of any two of the following: electricity, natural gas, fuel oil, or basic petrochemical products.

State governments also provided attractive incentives for businesses that located in their own states, such as exemptions or reductions of state taxes, real estate taxes, land transfer taxes, and deed registration taxes. However, companies that took advantage of these state-sponsored incentives were disqualified from receiving federal benefits. The tourism sector also qualified for special tax breaks ranging from 8 to 12 percent if companies invested in hotels. Finally, Mexico's two free ports, at Coatzacoalcos and Salina Cruz, provided prospective companies with exemptions from customs laws and were allowed to undertake assembly and finishing operations using duty-free imported machinery and inputs.

Between 1976 and 1982 direct foreign investment more than doubled, from US$5.3 billion to about US$11 billion. Concurrently, the number of companies with shares held by foreigners increased from 4,360 to 6,130. At the end of 1982 about 77 percent of foreign investment was concentrated in manufacturing, while services accounted for 12 percent, commerce constituted 8.5 percent, and agriculture and mining constituted about 2 percent. The major countries with foreign investment operations in Mexico included the United States with a 68-percent share, Federal Republic of Germany (West Germany) with 8 percent, Japan with 7 percent, and Switzerland with 5.3 percent. After Brazil, Mexico was the second largest recipient of direct foreign investment in Latin America.

Nevertheless, the decline in economic activity between 1982 and 1984 caused direct foreign investment to fall off significantly. Although the government expressed its interest in rectifying this, there were few indications as of late 1984 that concrete action had been undertaken. In 1983 and 1984 the government announced two highly controversial programs to restructure the automotive and pharmaceutical industries, both of which had heavy concentrations of foreign investment. The automotive decree announcing the program that was released on September 15, 1983 had the objective of bringing the automotive industry into conformance with national objectives and priorities. The decree reduced the number of car lines and types of models that could be manufactured between 1984 and 1987. Car assembly plants, however, had the option of earning additional car lines through the export of additional components and vehicles. Automotive companies would be required to increase the domestic content of manufactured inputs, but vehicles destined for export would be exempt. The domestic content requirement increased the percentage of local inputs that had to be used from 50 to 60 percent during the 1984–87 period. Assembly plants were required to balance their foreign exchange transactions on a model-year basis, and only a maximum of 20 percent of foreign exchange earnings could derive from the *maquiladora* industries. Moreover, the medium-sized truck market was effectively reserved for majority-owned Mexican companies.

In February 1984 the decree restricting the pharmaceutical industry was promulgated, which was primarily intended to help Mexican pharmaceutical laboratories increase their share of the domestic market. The retail sales of drugs provided for the introduction of generic products, required the uniform labeling and packaging of products, promoted the import substitution of active ingredients, and equalized the prices of equivalent drugs. The decree also expanded the government's role in licensing, production planning, sourcing, pricing, and marketing of all retail drugs. Thirty generic drugs were to be sold at discount prices at the retail level. Finally, the government's import substitution program would give Mexican laboratories a preference in awarding bids to produce active pharmaceutical ingredients. The electronics and food processing industries were expected to be restructured in a similar fashion during 1984 or 1985.

The government's foreign investment guidelines permitted 100 percent foreign ownership for all kinds of computer industrial activities in Mexico. In April 1984 the Apple computer firm began the production of 5,000 microcomputers near Mexico City. Apple and Grupo Manzana were developing Spanish-language software as production was geared toward the domestic market. Other computer companies that applied to set up manufacturing operations in Mexico included Hewlett-Packard, International Business Machines, Burroughs, and National Cash Register Corporation.

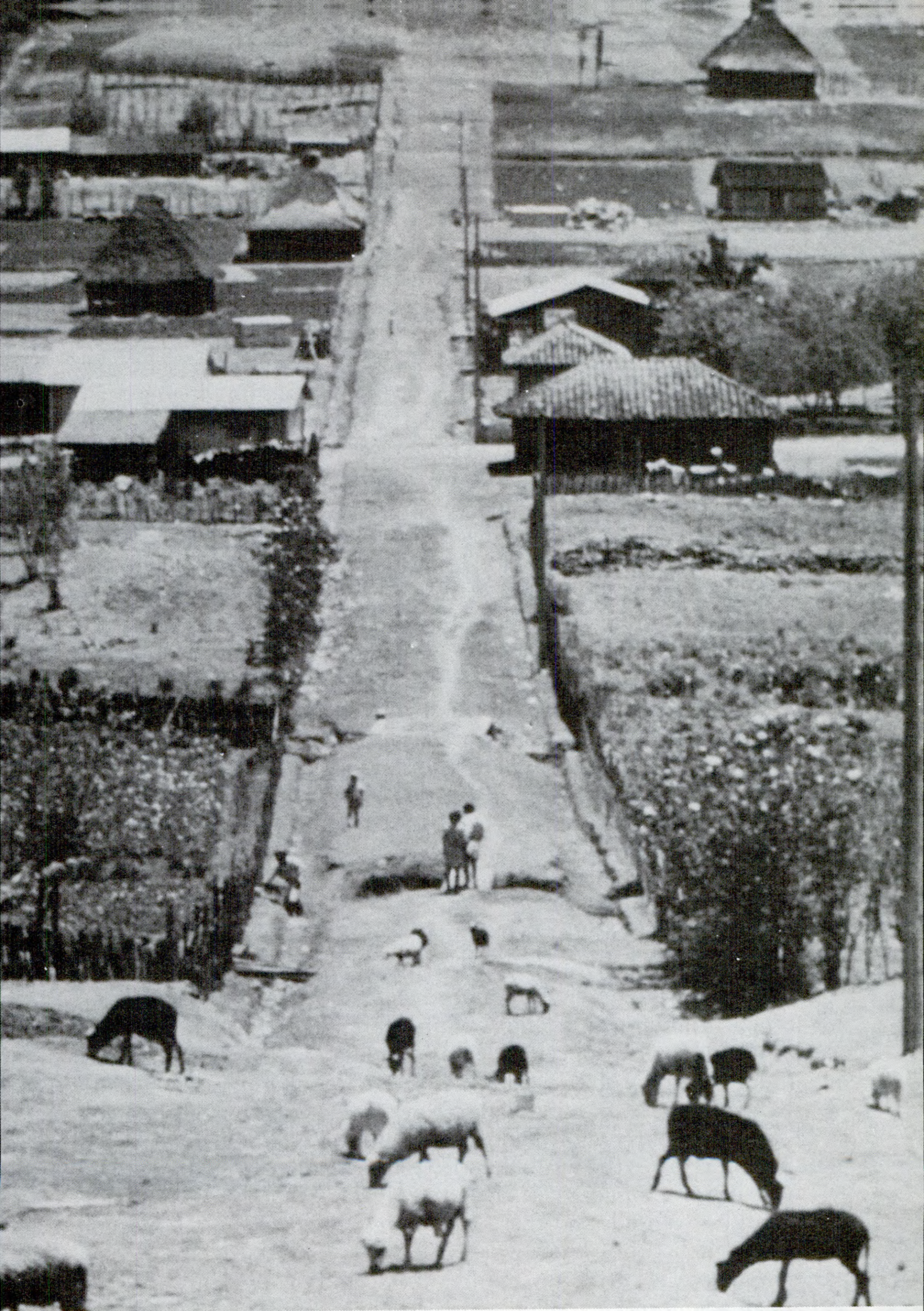
Agriculture

Land Tenure

Land tenure in Mexico is characterized by three kinds of landholdings: private, communal, and public. Article 27 of the Constitution of 1917 prescribes national sovereignty over all land and water resources within its territorial domain. This legislative mandate defined two distinct forms of nonpublic land tenure: private and social property. Social property is defined as being composed of communal and *ejidal* land (lands held by *ejidos*—see Glossary). Private land is delimited in size according to fixed equivalencies of irrigated or rain-fed land, types of crops raised, and the number of livestock held. All other land belongs to the government (see The Rural Society, ch. 2).

In 1980 the United Nations Food and Agriculture Organization estimated that Mexico's territory included 82 million hectares of private property, 83 million hectares of social property, and 10.5 million hectares of public land. Approximately 24,000 *ejidos* and 2.6 million *ejidatarios* (peasants working *ejido* lands) composed the area of social property. Private property was held in about 1.2 million farms. In total there were about 4 million parcels of land.

For almost 70 years agrarian reform has been a integral feature of Mexico's political, economic, and social structure. Twentieth-century land reform in Latin America began during the Mexican Revolution. Peasants who had been dispossessed of their land during the previous half-century fought to regain it with "land and liberty" as their battle cry in 1910. Under the Díaz dictatorship, private land surveying companies received one-third of all the land they surveyed as compensation from the government and had the option of purchasing the remaining land at very low prices. It has been estimated that these companies surveyed 32 million hectares between 1881 and 1900, received 12 million hectares as compensation,and purchased 14 million additional hectares for a paltry sum. By the time the companies were dissolved in 1906, they had surveyed an additional 16.8 million hectares, most of which they obtained through the same means. Most of the



Ejido in state of Chiapas
Courtesy Mexican National Tourist Council

best lands were thus concentrated in the hands of a few large landowners. Ninety-six percent of the population was landless, and only 1 percent of the population owned 97 percent of the land in 1910. Approximately one-half of all agricultural land was controlled by 835 haciendas. Moreover, nearly 80 percent of the 70,000 rural villages were tied to the haciendas through debt peonage (see The Porfiriato, ch. 1).

On January 6, 1915, at the height of Revolutionary fervor, President Venustiano Carranza promulgated the decree that began the process of agrarian reform. All communal lands that had been improperly divested from their owners since 1856 were to be immediately returned, and villages not possessing land titles but in need of land would be so provided. Such land was to be expropriated from private hacienda owners or from excess reserves of government land. The principles of agrarian reform as embodied in the decree of 1915 were incorporated into Article 27 of the Constitution of 1917.

Article 27 and subsequent agrarian legislation established the *ejido* as a primary basis of land tenure in Mexico. *Ejidos* were modeled on an important form of communal land tenure in the pre-Conquest and colonial epochs. The term *ejido* is derived from the Latin word *exitus*, or exit, and signifies the lands on the outskirts of a village in New Spain that were used by Indian communities to raise staples of corn and rice and tend their livestock. In the twentieth century an *ejido* came to represent a peasant community established on lands expropriated in the name of the Mexican Revolution.

The *ejidal* system of land tenure granted land to a community rather than to individuals (see The Rural Society, ch. 2). A peasant was required to be a member of an *ejido* in order to have access to its land. Initially, only lands within seven kilometers of a community could be expropriated from hacienda owners. Pastures and woodlands were often worked collectively, but cropland was usually assigned to an individual to work throughout his lifetime. In 1960 only 3 percent of all *ejido* cropland was worked collectively, and 2 percent of the more than 1.5 million *ejidatarios* belonged to agricultural cooperatives. By law, individual land plots could not be sold or rented, and the government could take an *ejidal* plot away if it had not been worked for two consecutive years. An *ejidatario* was entitled to bequeath the land to one of his heirs. A female *ejidataria* was allowed to work her assigned parcel of land as long as she remained married to an *ejidatario*.

Article 27 also regulated the size of private property. In order to prevent the complete decapitalization of the most productive producers, the haciendas were streamlined to medium-sized estates. This enabled a greater use of estate land than existed under the traditional hacienda system. Private property could not be expropriated if it conformed to certain size limitations. The original law defined private property as land that did not exceed 100 hectares of irrigated land or the equivalent of 200 hectares of rain-fed land, 400 hectares of good-quality pastureland, or 800 hectares of arid pastureland. In addition, one could own 150 hectares of land to cultivate cotton; 300 hectares to grow bananas, sisal, sugarcane, coffee, rubber, coconuts, grapes, vanilla, or fruit trees; or the amount of land necessary to maintain 500 head of cattle or other livestock. An *ejidal* plot, however, was originally fixed at 10 hectares of irrigated land or its equivalent in other land.

Subsequent legislation redefined the legal limitations on *ejidal* and private property size. The passage of the Agrarian Code of 1934 gave permanent laborers on haciendas the legal right to claim a parcel of *ejido* land. Moreover, private property was henceforth reduced in size from 100 hectares to 50 hectares of irrigated land or its equivalent. The New Agrarian Code of 1942 reduced the size of a parcel of *ejido* land from 10 to six hectares. In 1946 Article 27 was amended so that private property and a parcel of *ejidal* land were restored to 100 and 10 hectares, respectively. In addition, the right of *amparo* (see Glossary) was introduced. In effect, this law vested landowners with judicial protection against expropriation or seizure, even when the property limits were far above sizes authorized by the law.

During the first 20 years of the land reform program, relatively few lands were redistributed. Fifteen years after the promulgation of the decree of 1915, only 6 percent of the country's land had been redistributed to one-fourth of the rural families in need of land. The largest portion of land was redistributed during the administration of Cárdenas (1934–40). Between 1935 and 1940 a total of 17.6 million hectares of land was redistributed to 808,000 *ejido* beneficiaries. Moreover, the share of cultivated land on *ejidos* jumped from 13 to 47 percent. Cárdenas also established almost 800 collective *ejidos* during this period, in which all *ejidal* land resources were pooled for collectively organized production. Most of these collective *ejidos* eventually reverted to the individual form of production by the 1960s.

During the 1940s and 1950s the pace of land redistribution slowed down. Industrialization supplanted agrarian reform as growth at any price became a high priority of development policy. The pursuit of import substitution industrialization policies reoriented agrarian policy toward the promotion of large-scale commercial agriculture. Until the 1960s agricultural exports were the primary source of foreign exchange for the industrialization program. The land-hungry were ameliorated by promoting the settlement of land in the semiarid regions of the north on which nonirrigated crops could be cultivated. This land was ceded by large cattle estates in the northern states in exchange for guarantees, under the right of *amparo*, against further expropriation. Agricultural production increased more rapidly on the larger propertied estates because of the development of irrigation and because the provision of credit and mechanization inordinately favored the larger producers. Thus, over this 20-year period, production on farms in excess of five hectares increased by 364 percent, while production on *ejidos* increased by 210 percent.

As of 1960 approximately 26 percent of farmland, 43 percent of all cropland, and 40 percent of the irrigated land was held by 42 percent of the rural population within *ejidos*. *Ejidatarios* produced 36 percent of agricultural output, supplied 34 percent of all marketed farm products, and exported over 25 percent of their production. About 44.5 million hectares had been distributed to 1.5 million beneficiaries by 1960; 10 years later, 60.7 million hectares had been distributed to almost 2 million beneficiaries. These land allotments helped raise the percentage of all land in farms held in *ejidos* to 43 percent and cropland to 51 percent. By 1970 about 66 percent of the rural population lived on *ejidos*. Although 2.9 million people owned or had usufructuary rights to land in 1970, the rapid growth of population had increased the number of landless peasants to 4.5 million. In 1983 about 3.5 million *ejidatarios* controlled almost half of the cultivated land in the country; the remainder was under private ownership. After 1970 a large proportion of redistributed land was allotted to large cooperative livestock *ejidos* in the semiarid northern regions of Mexico. Approximately one-half of all the cattle in the country thereafter belonged to *ejidos*.

During the 1970s and early 1980s two overriding concerns shaped the direction of agrarian reform: the realization that there were more petitioners for land distribution than there was land available for such purposes, and the pressing necessity to counteract the decline in agricultural output (see Crops, this ch.). During the administration of López Portillo, the president publicly announced that there was no more land available for distribution to *ejidatarios*. Although public lands had been exhausted, de la Madrid was expected to continue land reform by taking action against landowners whose lands were idle or obviously larger than what was allowed under the law. In order to resolve the crisis of diminished food production and to increase rural employment among *ejidatarios* and private smallholders in rain-fed districts, the government enacted a number of measures, including the New Law of Agrarian Reform of 1971, the Law for Agricultural and Livestock Development of 1981, and laws creating the Mexican Food System in 1980 and the National Food Program in 1983 (see Government Policy, this ch.).

Land Use

In spite of an inhospitable climate, undulating topography, and hydrological imbalances, Mexico has markedly expanded the size and distribution of its cropland through the use of irrigation. The Mexican government said that, out of a total land area of 192.3 million hectares, approximately 35 million hectares were cultivable, 44 million were suitable for forestry, 78 million were range and pastureland, and the remaining one-third of the land was too steep, arid, or eroded for cultivation in the early 1980s. The inadequate availability of water remained a major constraint to agricultural production. Both precipitation and Mexico's riverine resources were geographically maldistributed. According to the United States Department of Agriculture, only about 25 percent of the total land area received sufficient rainfall during the spring-to-summer cropping season and only 5 percent during the winter season. More than one-half of the total water supply was provided by Mexico's largest rivers, which were mainly located in the high rainfall and flood-prone areas of the southern tropics. Moreover, only 15 percent of the country's water was located in the Mesa Central, where 50 percent of the cropland was located (see Physical Setting, ch. 2).

In his first state of the nation address, de la Madrid reported that the total harvested area of the nation was about 15.5 million hectares in 1982, of which 66 percent was located in rain-fed areas and 34 percent was irrigated. Since the early 1970s the harvested area ranged from a low of 14.8 million to a peak, in 1981, of 19.5 million hectares. Cultivated land expanded in tandem with the greater usage of rain-fed land for farming and with the introduction of irrigation. During the 1940s and 1950s farmers responded to the rising demand for agricultural products by increasing the quantity of land under cultivation. Rain-fed land peaked at 41 million hectares in 1960, after having expanded by over 10 million hectares from 1940 to 1960. At the same time, the development of extensive irrigation programs finally broke the stranglehold that drought had held on further expansions of cropland in the north. Thereafter, irrigated croplands expanded from 4 to 53 percent of the cultivated area in the northwestern states between 1940 and 1960. In the northern states, irrigation expanded to 15 percent of total cropland by 1960. In 1950 only one-eighth of all cropland had been irrigated. Over the succeeding 15 years, irrigated land expanded by 2 million hectares, to 3.5 million in 1965, whereas conversion averaged 150,000 hectares per year during that time. After 1965 the development of irrigated land slowed to about 100,000 hectares annually.

Although irrigated cropland only accounted for 20 to 30 percent of the total area harvested during the 1960s and 1970s, it contributed about 50 percent of total agricultural output and supplied almost two-thirds of the farm products consumed in urban Mexico. In addition, a growing proportion of irrigated land was devoted to fruits and vegetables for export and to feed crops for livestock. Rainfed areas, in contrast, accounted for 70 percent of the total cropland but provided just under one-half of agricultural output value. Subsistence farming was the predominant form of production in the rain-fed areas. The majority of the staple production of corn, beans, and rice was consumed on the family farm. About one-half of all cropland was used to grow corn and one-eighth to beans. These traditional staples were concentrated in the low rainfall areas of the Mesa Central.

Yields for irrigated crops tended to be about two and one-half times higher than crops cultivated under rain-fed conditions. Over four-fifths of the wheat, soybeans, cotton, and safflower crops were grown in irrigated fields as well as almost two-thirds of the rice, tomatoes, and chilies. Irrigation and the ready access to modern agricultural inputs were largely responsible for the improvement of yields in a wide variety of crops from 1965 to 1980. Crops whose yields improved included corn, beans, rice, wheat, chilies, onions, potatoes, bananas, grapes, alfalfa, barley, sorghum, oats, cacao, chick-peas, garlic, tomatoes, canteloupes, watermelon, cucumbers, and cotton. Yields were stagnant or declined during the period for sugarcane, copra, peanuts, safflower, sesame seeds, soybeans, apples, avocados, lemons, mangoes, oranges, peaches, coffee, strawberries, henequen, and tobacco.

In the 1950s the Center for Corn and Wheat Research (Centro de Investigaciones para el Mejoramiento de Maiz y Trigo—CIMMYT) was established in Mexico by the Rockefeller Foundation to conduct agricultural research in order to expand specific crop yields and disseminate information to farmers through extension programs. In its earlier years CIMMYT was highly successful in making Mexico self-sufficient in wheat and in exporting improved seed varieties to other Third World countries as part of the so-called Green Revolution. The National Institute of Agricultural Research (Instituto Nacional de Investigaciones Agrícolas—INIA) was founded in 1960 and subsequently became the principal institution responsible for agricultural research. Although numerous advances were made in developing drought- and disease-resistant hybrid seeds, most of the benefits of the research conducted by INIA were reaped by the larger, well-capitalized and irrigated farms of the northern states.

Crops

Agricultural production in Mexico was characterized by small-scale farming of traditional staples and dominant large-scale commercial farming of export crops, fodder for livestock, raw materials for industry, and luxury foods for the domestic market (see table 14, Appendix). Corn, beans, and rice have long been the staples of the Mexican diet, while the more profitable commercial crops included fresh fruit, vegetables, feedcrops, oilseeds, coffee, cotton, and wheat. As a result of the low remuneration for the cultivation of staples and the increasing lure of export markets, the quantity of land devoted to the production of staple commodities stagnated or declined between 1960 and 1981. In 1981 staple output on rain-fed land expanded owing to generous production incentives introduced under the new SAM program (see Government Policy, this ch.).

In response to market-generated forces, agricultural production in the irrigation districts was gradually diversified toward a wider range of commercial crops. During the 1940s cotton, corn, wheat, and alfalfa accounted for nearly 90 percent of the harvested area under irrigation. By the mid-1960s this proportion had declined to 74 percent, while rice, safflower, sesame seeds, soybeans, and sorghum increased their presence. At the turn of the 1970s, about 19 percent of harvested area under irrigation produced oilseeds; 16 percent, alfalfa and sorghum feed crops; 16 percent, corn; 14 percent, wheat; 9 percent, cotton; 4 percent, sugarcane; and 3 percent beans and rice.

According to official government figures, the total harvested area of the country expanded from the mid-1960s to 1980 for safflower, soybeans, apples, avocados, grapes, lemons, mangoes, oranges, peaches, alfalfa, barley, oats, sorghum, chick-peas, garlic, tomatoes, melons, watermelon, cucumbers, and tobacco. The area devoted to coffee, rice, sugarcane, and cacao stagnated, while that for corn, beans, wheat, cotton, peanuts, sesame seeds, bananas, strawberries, and henequen declined. Production demonstrated a similar trend, except that corn, wheat, and bananas registered slight production increases despite a decline in the area under their production. Thus, by 1980, such traditional export crops as henequen, cacao, cotton, sugarcane, and coffee and the staples of corn, rice, beans, and wheat were stagnant or had declined. The most consistent gains in production during the period were recorded for fruits, vegetables, feedcrops, and oilseeds.

Historically, crop production has been very sensitive to weather conditions in both irrigated and rain-fed areas. Between 1970 and 1974 crop production increased almost 3 percent per year. In 1975 and 1976 agricultural output fell; it recovered in 1977 and 1978, fell in 1979, rose in 1980 and 1981, fell in 1982, and increased in 1983 and 1984.

Total grain production in 1983 was approximately 17.8 million tons, a 22-percent expansion over 1982 levels. Wheat production in 1983 was 3.2 million tons. Of this total, approximately 1.45 million tons were cultivated in the state of Sonora; 450,000 tons in Sinaloa; 500,000 tons in Baja California Norte; 300,000 tons in Guanajuato; 200,000 tons in Chihuahua. The remaining 300,000 tons were produced by smaller production states and in the small fall/winter harvest. About 3.5 million tons of wheat were consumed in 1983, and an additional 600,000 MT were used for livestock feed. Demand for wheat declined from earlier years because the price of wheat-based bread was doubled, and consumers shifted to lower priced corn tortillas. The shortfall between production and consumption had to be made up by imports. As a result of increased production and decreased consumption of wheat products, however, wheat imports were expected to decline in 1984. About 90 percent of Mexico's wheat crop was irrigated. Production levels in 1984 were expected to increase to 3.8 million tons as a result of optimal planting conditions.

Corn production was 9.3 million tons in 1983, or about 33 percent higher than the harvest of 1982. Nonetheless, 1983 production levels were 3.2 million tons less than the production peak of 12.5 million tons attained in 1981. About 11.6 million tons of corn were used for human consumption in 1983, and 500,000 tons were used for feed. According to the United States Department of Agriculture, about 95 percent of the corn produced in Mexico was of the white variety used for domestic consumption. In the early 1980s about 48 percent of the corn output in Mexico was used for corn dough, 13 percent for corn flour, and 4 percent for corn products (such as starch and glucose); the remaining 35 percent was consumed on the farm. Throughout the 1970s Mexico was forced to import corn in order to meet rising demand requirements; in 1983 about 3.7 million tons were imported. About 10 percent of the corn was produced under irrigation. Production in 1984 was estimated to have remained near 1983 output levels.

Along with corn, beans were a mainstay of the Mexican diet. About 1.1 million tons were produced in 1983, which was 38 percent higher than for 1982. Slightly more than 1.2 million tons were consumed by humans; only a modest 10,000 MT were used for feed. Imports were periodically necessary to augment domestic supplies. During the 1970s imports were required in all years except 1971 and 1976. Beans were also imported in 1980 and 1981. About 10 to 15 percent of the area devoted to the cultivation of beans was irrigated. Production in 1984 was estimated at about 1 million tons.

Mexico produced about 450,000 tons of long grain rice in 1983. About 300,000 tons of rice were processed in rice mills. Approximately 400,000 tons were consumed domestically; the 100,000-ton shortfall was imported. Around 45 percent of the rice area was irrigated. The state of Sinaloa was the largest producer of irrigated rice and usually supplied about 30 percent of total production. The area devoted to the production of rice was expected to increase in 1984 in order to meet domestic demand requirements. This increase and favorable weather conditions were expected to increase the 1984 long-grain rice production to some 540,000 tons; 360,000 tons were to be processed in rice mills.

Sorghum production in 1983 rebounded to 4.5 million tons after a drought-plagued decline of more than 40 percent in 1982. The production of sorghum by state was estimated to have been 1.1 million tons from Guanajuato; 600,000 tons from Jalisco; 650,000 tons from Michoacán; 100,000 tons from Sinaloa; 80,000 tons each from Querétaro and Morelos; 70,000 tons from Tamaulipas; and the remaining output from various other states. In addition, 1.7 million tons were provided during the summer harvest, of which 1 million were supplied by Tamaulipas. About 35 percent of the sorghum area was irrigated. Sorghum was an important feed source for Mexico's livestock industry; about 5.7 million tons were used for feed in 1983. Moreover, about 200,000 tons were used for human consumption, as sorghum became a substitute food source over higher priced corn. The demand for sorghum as a feed surpassed the supply in 1983, and as the economic situation improved in 1984, additional supplies were sought for use by the livestock sector. Imports of sorghum steadily increased after 1976. About 2.1 million tons were imported in 1983. Production in 1984 was slightly lower than in 1983.

Cotton production during 1983 reached 218,000 tons, an improvement of about 20 percent over production in 1982 of 181,000 tons. The 1983 figure, however, was only about 50 percent of normal production levels. Production declined by 42 percent in 1982 as a result of unfavorable domestic and international prices that existed at the time that planting decisions had to be made in late 1981 and early 1982. Moreover, from 1982 to 1984 the lack of credit was a principal disincentive to increased output. The official government policy of preferential treatment to producers of basic commodities, together with the much higher production costs for cotton, made credit institutions reluctant to grant loans to cotton growers. The severity of the economic crisis in 1982 had a negative impact on textile producers, apparel industries, and consumer demand. In response to depleted domestic supplies of cotton, the government placed an embargo on the exportation of cotton in that year, and for the first time in its history, Mexico imported about 1,000 tons of cotton. In October 1983 the government lifted the embargo on cotton exports. As a result of improved production in 1983 and estimated stock levels of about 16,000 tons, Mexico exported about 109,000 tons of cotton. About 98,000 tons of cotton were consumed as domestic consumption stabilized in 1983 and 1984. Cotton production in 1984 was expected to reach 283,000 tons in response to favorable weather and improved prices for exported cotton. Cotton exports were thus expected to rise to 163,000 tons in 1984.

In 1983 about 33.9 million tons of sugarcane were converted into 3.1 million tons of sugar in some 68 centrifugal sugar mills. Between 1980 and 1983 sugar output increased by more than 5 percent per year but was nonetheless unable to keep pace with the rapid growth in consumption. From 1973 to 1983, Mexico's per capita consumption of sugar increased twice as fast as the average level of world consumption; by 1983 it stood at 45 kilograms. Mexico first became a sugar importer in 1979. Between 1979 and 1983 an average of some 590,000 tons of sugar was imported to satisfy domestic demand. Historically, Mexico had been an important exporter of sugar but because of domestic shortfalls no sugar was exported from 1976 to 1981. About 15,000 tons annually were exported in 1982 and 1983. Because of improved weather prospects, production in 1984 was expected to increase to 3.3 million tons, and exports to rise to 50,000 tons.

Mexico was the fourth largest producer of coffee in the world and the sixth largest exporter. In Latin America, Mexico was the fifth largest exporter of coffee, after Brazil, Colombia, El Salvador, and Guatemala. According to the Mexican Coffee Institute, Mexico exported 113,000 tons of coffee in 1982 and 180,000 tons in 1983. Although a member of the International Coffee Organization (ICO), which regulates countries' export quotas, Mexico began to export a growing proportion of coffee above ICO export quota limits to nonmember countries in the 1980s. More than one-half of production was exported annually. In 1983 coffee output increased by 15 percent over 1982, to 282,000 tons. Production in 1984 declined to about 270,000 tons because of weather damage to the coffee crop.

Mexico's output of oilseeds rose in 1983 by 14 percent over 1982 production levels but remained about 10 percent below the average for 1979–83. Overall oilseed production declined as a result of diminished output levels of safflower, sesame seed and cottonseed. Soybean production in 1983 increased by 13 percent over 1982, to 620,000 tons but remained below record production levels of 680,000 tons in 1979 and again in 1981. Rising demand led to almost 1.6 million tons of imports. Tobacco production declined by 13 percent over 1982 levels due to adverse weather. Tobacco output was 60,000 tons in 1983, or 1,000 tons less than production in 1970. Mexico was also a leading producer of cacao beans, from which cocoa and chocolate are derived. Cacao bean production in 1983 attained a record output of 42,000 tons as a result of excellent weather and expanded area devoted to cacao production. About 15,000 tons were exported in 1983. Although henequen output increased by almost 9 percent in 1983 to 76,000 tons, the prospects for this monoculture of the Yucatan peninsula had been dismal for a number of years. Approximately 70 percent of the area devoted to henequen belonged to *ejidatarios* and 30 percent to small farm owners. Only 60 percent of the 150,000 hectares of land area producing henequen was cultivated. Almost 10,000 hectares are lost annually to the production of henequen. Exports were estimated to have reached 41,000 tons in 1983, nearly a 37-percent increase over 1982 export levels.

Livestock

Until the early 1980s Mexico's livestock industry had experienced steady growth both in livestock numbers and in consumer demand for livestock products. This progress was reversed in 1982, however, as the livestock sector entered a severe recession. With a few minor exceptions, Mexican livestock numbers and the production of beef, veal, lamb, mutton, goat, turkey, milk, and eggs stagnated or declined in the subsequent two years. The scarcity of foreign exchange and the 1982 devaluation of the peso caught livestock producers and processors in a cost-price squeeze as production costs and the peso cost of imports soared. During the height of the recession in late 1982 and early 1983, the demand for meat declined substantially in tandem with diminished consumer income; lower income groups consumed greater quantities of seafood and eggs as protein sources, while the middle and upper classes shifted from higher priced beef and pork to lower priced poultry.

Between World War II and 1982 the rate of Mexico's cattle expansion surpassed that of all other Latin American nations as well as the advanced agricultural countries, with the exception of Australia and New Zealand. During the 1950s and 1960s the number of cattle grew by 1.9 percent per year. Over the next decade, cattle production rose by 2 percent per annum. The largest increases occurred in the tropical grasslands of the Gulf states for the domestic market and in the semiarid northern region from which most of the live cattle were exported to the southwestern United States. Since the early 1970s cattle numbers increased by 4.3 percent annually in the Gulf states, compared with 2.6 percent in the north.

In 1980 total cattle stock stood at 33 million head. In 1982 the number of cattle peaked at 34.7 million head before declining to 33.9 million in 1983. Fluctuations in herd size were directly affected by market forces and vagaries in the weather. In normal years the kinds of cattle that were slaughtered for domestic consumption and export consisted of approximately 20 percent cows and 26 percent calves; the remaining 54 percent were a combination of other kinds of cattle. In abnormal years, such as the drought year of 1975, cattlemen were forced to cull their herds by increasing the slaughter rate. The dual effects of a devaluation of the peso and a recession in 1976 and 1977 cut the consumer demand for meat so that the slaughter rate declined and inventories increased. The economic recovery of 1980 increased demand for beef and resulted in a higher slaughter rate. During 1982 and 1983 the combined effects of drought, devaluation, and recession did not translate into higher slaughter rates because of dampened demand. An 18-percent decline in the demand for meat in 1983 reduced the slaughter rate from approximately 7.2 million head in 1982 to 6.4 million in 1983. The demand for meat was expected to recover slightly in 1984, causing the number of cattle slaughtered to increase to 6.9 million head.

Disease and adverse weather habitually cause high death losses for cattle. According to the United States Department of Agriculture, annual losses from death average about 1 percent for cows, 3 percent for calves, and 2 percent for all other types of cattle. Gastrointestinal parasitosis accounted for 15 percent of disease-related losses. Tick-transmitted diseases of anaplasmosis and priolasmosis were the second most common diseases. Brucelosis and tuberculosis account for 10 percent of fatalities, and bovine rabies accounted for another 10 percent of total losses. In 1982 and 1983 drought led to a total death loss of about 2.3 percent. Nearly 432,000 head of cattle died from the drought in 1983.

The number of dairy cows increased until 1980, leveled off at 2.3 million head in 1981, and declined very slightly in 1982 and 1983. These dairy cows, however, only represented 32.3 percent of the total number of cows that were milked in Mexico but produced almost 70 percent of the total milk. The remaining 70 percent of the cows that produce milk were only milked from 50 to 150 days a year. On average there were approximately 11 million dual-purpose cows between 1980 and 1983. From 1972 to 1981 domestic milk output in Mexico declined. In 1982 milk production recovered with an output of 9.8 million tons of milk. In 1983 milk output fell again to 9.6 million tons. In 1984 it was expected to slide to a low point of only 7.4 million tons. The principal reasons for the production declines were the economic recession and the controlled ceiling price on pasteurized milk. Profit prospects were expected to improve for the dairy industry as a result of the government's announcement that milk prices would be revised three times a year. In 1982 and 1983 about 34 percent of milk production was used for industrial plants to produce condensed, evaporated, and dry milk, as well as cheese and other by-products.

The swine industry increased its stock of live hogs after 1981, but decreased supplies of domestic grain and oilseed escalated the cost of feed, and the subsequent devaluation of the peso caused the demand for pork to drop. Thus, a higher proportion of sows were sent to slaughter in 1982 and 1983. The total supply of hogs declined by 2.5 percent, from 34.4 million in 1982 to 33.5 million in 1983. In addition, the shortage of foreign exchange prevented live hogs for reproduction from being imported in as large a volume as would have been required to increase overall swine inventories. These imports declined by 90 percent from 1982 to 1983. Nearly 40 percent of total pork production was consumed domestically, 20 percent was used for various processed products, such as ham and sausage, and the remainder was sold as fresh meat to supermarket chains and retail outlets. By the end of 1984 pork production was expected to recover to the levels attained in 1982.

The largest concentrations of sheep were found in the states of Hidalgo, México, Puebla, and Oaxaca. The number of sheep in México averaged about 6.6 million during the first half of the 1980s. The constraints to increased production in the higher elevations of the Mesa Central included poor grazing land, fragmented land tenure, and the difficulty of shifting the flocks from overgrazed to average grasslands. Mexico's goat population was a mainstay of the rural economy. The principal goat-producing states were Coahuila, San Luis Potosí, Zacatecas, Puebla, and Oaxaca. The total goat population ranged between 9 and 10 million from the early 1970s to the early 1980s.

Poultry was the most dynamic section of Mexico's livestock industry. Total poultry production oscillated from a high point of 560,000 tons in 1982 to a low of 510,000 tons in 1983. The decline in 1983 was owing to high prices, limited supplies of feed, and curtailed imports of baby chicks, fertilized eggs, and high-quality breeding stock. Poultry meat producers were consequently forced to operate at only 75 percent of their normal capacity during 1983. Approximately 30 to 40 percent of total poultry meat was domestically consumed, 5 percent was used in processed products, 10 to 20 percent was used by the commercial fried chicken business, and the remaining 35 to 55 percent was sold as fresh meat in supermarkets or retail outlets. Chicken production was estimated to have declined from 455,000 tons in 1982 to 400,000 tons in 1983. Turkey meat production also declined. About 70 percent of the production of turkey meat was consumed during the Christmas season. Nearly 20 percent was sold throughout the year to restaurants and supermarkets, and about 10 percent was grown by backyard operators. Turkey production averaged about 32,000 tons during the 1981–84 period. Egg production declined from 11 million eggs in 1981 to 10 million in 1982 and an estimated 9.8 million eggs in 1983. Poultry production was expected to resume its historic pattern of growth in 1984.

Forestry and Fishing

According to the Mexican government, the nation's total forest area encompassed 41 million hectares in 1983, or 21 percent of the total land area. Total forested area included 27.7 million hectares of temperate or cold climate forests and 13.2 million hectares of tropical and subtropical forests. Forested plantations for industrial use were insignificant. Deforestation was increasingly a problem in Mexico. Annual deforestation estimates by the

United Nations Food and Agriculture Organization and the Inter-American Development Bank ranged between 400,000 hectares and 530,000 hectares in the early 1980s. This large-scale diversion of Mexico's forestland was caused by the mounting need for agricultural land and pastureland, rising demand for firewood in the rural areas, fires, overcutting, insect damage, and the lack of adequate enforcement of laws to prevent illegal tree cutting. In his presidential campaign, de la Madrid emphasized the importance of reforestation and of a careful land-use management program for existing forests. The severity of the economic crisis, however, forced the program to be canceled.

Mexico's total 1983 forest product output of 9 million cubic meters represented a decline of 1 and 0.5 million cubic meters from production levels in 1981 and 1982, respectively. The fall in 1983 output was largely attributed to the fall in demand for forest products caused by the economic recession. In 1982 production of semiprocessed and processed lumber was 8.3 million cubic meters; sawn wood, 2.1 million cubic meters; and roundwood, about 6.8 cubic meters. Pine was the dominant tree species in Mexico's forests, and soft tropical pinewood was the principal tree used by the lumber industry. Most of the production of forest products in Mexico was derived from the coniferous species, followed by fine tropical timber, such as red cedar and mahogany, and by a few species of conventional deciduous trees. Overall, Mexican timber was considered to be of good quality.

The main categories of lumber products used by industry included sawn wood, cellulose, plywood, particleboard, and fiberboard. According to the National Chamber of Manufactured Forest Products, industrial demand for lumber products declined in 1983 by 20 percent from the 1982 level of 11.6 million cubic meters. Housing and the production of furniture were most severely affected by the economic recession. In 1983 both of these activities declined by approximately 40 percent. The demand for paper cartons and telephone posts expanded.

International trade in wood products was limited. The devaluation of the Mexican peso made Mexican lumber products more competitive in international markets, and small quantities of domestic panel products, such as wood chips and veneer, were diverted from the domestic market and exported to the United States. In line with the unfavorable foreign exchange situation and the government policy of reducing imports of both nonessential agricultural and nonagricultural commodities, imports of forest products were slated to decline. Although marginal imports of roundwood, wood poles, sawn wood, train car sleepers, panel products, plywood, fiberboard, and particleboard continued in the early 1980s, the government sought to increase domestic production as a means of curtailing further wood product imports.

One of the principal constraints on an enhanced forestry management program was the scarcity of trained foresters in the country. It was estimated in the early 1980s that there were approximately 1,400 foresters being trained at schools administered by the Secretariat of Agriculture and Hydraulic Resources, and that there were about 1,800 with bachelor of science degrees. Forestry was taught at the undergraduate level in seven universities and at the graduate level at the National Agricultural University at Chapingo and at the Institute of Wood, Cellulose, and Paper. About 20 students were enrolled at the graduate program in forestry at Chapingo.

In the early 1980s it became clear that the vigorous growth of the Mexican fishing sector would continue in the future and would not revert to the marginal position that it had held prior to 1976. In his 1983 state of the nation address, de la Madrid recognized the important potential that fisheries could play in increasing the availability of basic foodstuffs to the Mexican population. In order to continue the modernization of the Mexican fishing industry and develop the product for domestic consumption, the president emphasized his administration's commitment to support the integration of cooperativism and private enterprise with the state fishing companies so that they could jointly produce a more efficacious development of the sector. The enhanced status of the fishing sector was recognized through the elevation of the Department of Fisheries to cabinet status on January 5, 1982.

Mexico's overall ocean marine catch increased from 500,000 tons in 1975 to a high point of 1.6 million tons in 1981, before declining to 1.5 million and 1.1 million tons in 1982 and 1983, respectively. The major factor accounting for the decline in the total catch was a drop in the tuna catch from 74,000 tons in 1981 to 43,000 tons in 1982. According to the Mexican Secretariat of Fisheries, significant declines also occurred in 1982 for catfish, squid, carp, dogfish, perch, mullet, snapper, oysters, sardines, and anchovies. Significant catch increases were registered for clams, anchovies for packing, porgy, wahoo, snook, sardines, and in unregistered catches.

Shrimp was Mexico's most important fishery product in volume and value. Shrimp catches increased from 72,000 tons in 1981 to 79,000 in 1982 and peaked at almost 99,000 tons in 1983. Eighty-seven percent of its shrimp exports went to the United States, which accounted for about half of Mexico's total fish exports in volume. In 1982 Mexico exported about 36,000 tons of shrimp, valued at some US$375 million, to the United States. Mexico estimated its shrimp exports to the United States in 1983 would value about US$425 million. This would make shrimp Mexico's second largest foreign exchange earner after petroleum. In 1982 Mexico's fishery exports totaled more than 92,000 tons, of which shrimp accounted for almost 45 percent of the total.

Fish caught off the Pacific coast surpassed the quantity of fish caught in the Gulf of Mexico and in Caribbean waters by a ratio of five to one. Pacific coastal waters provided 1.2 million tons versus a catch of 296,400 tons off the Gulf coast. Tuna, abalone, and sardines were not caught off the Gulf coast at all, while 70 percent of the shrimp were caught in the Pacific.

Fishing activities actively engaged 111,000 persons in Mexico during 1982. Workers were almost evenly divided between cooperatives and private sector activities. Sixty-eight percent worked on the Pacific side, and the remainder were on the Gulf coast or on islands. Mexico's fishing fleet stood at 43,225 boats in 1982. The shrimp fleet included 13,000 vessels, and the tuna fleet numbered about 70. Approximately half of the fishing fleet was privately owned. Over half of the aging fleet was built prior to the mid-1970s. Moreover, the scarcity of foreign currency during the late 1970s and early 1980s had a negative impact on the fleet owing to its dependence on imported propulsion and navigation replacement parts.

Of the total 1982 catch, about 65 percent was processed prior to final sales. Mexico had an installed capacity of 328 processing plants, which included 37 canneries, 203 frozen and refrigerated installations, 55 reduction plants, and 33 plants that performed a combination of other processing tasks.

Government Policy

Mexico has long attempted to find a compromise between two competing objectives of agricultural policy: increasing the output of export-oriented crops and the cultivation of food crops for domestic consumption. Between 1940 and 1965 the government pursued a dual strategy that fostered large-scale commercial farming for export and also complied with the constitutional imperative to enhance social justice through land redistribution and the allocation of resources to the rural poor. Thus, until the mid-1960s, Mexico was largely self-sufficient in basic staples, and agricultural exports provided most of the foreign exchange to fuel the ambitious industrialization program that had been under way since 1940. During this 25-

year period Mexico's food production doubled, and agricultural output surged by 5.7 percent per annum.

These golden years of Mexican agriculture, however, also sowed the seeds for the stagnation and decline of agriculture after 1965. The government responded to the need for export revenues by promoting large-scale farming in the northern states as the source of agricultural exports. Public investments in irrigation primarily benefited large private farmers in the north, while the states of the Mesa Central, the southwest, and the lower Gulf of Mexico were primarily farmed on rain-fed land by subsistence farmers, who made up the largest segment of the population in those areas. Commercial farms also reaped most of the benefits from the diffusion of improved seeds and other modern inputs. Additionally, public and private credit institutions favored the larger commercial producers over small private landholders and *ejidatarios*. At the same time, the government kept guaranteed or minimal purchase prices for staple commodities low in order to provide inexpensive food and maintain low wages in the urban areas. Consequently, large commercial farms produced for the more lucrative export and domestic agro-industrial markets, while traditional farmers who lacked sufficient land and capital cultivated the less profitable staple crops.

Since the 1920s succeeding government administrations have attempted to modernize traditional agriculture through the provision of credit. In 1926 the Law of Agricultural Credit created the Agricultural Bank in order to assist the beneficiaries of the agrarian reform, both private small landholders and *ejido* members. In the mid-1930s the administration of Lázaro Cárdenas established the National Bank of Ejidal Credit (Banco Nacional de Credito Ejidal—BNCE) as the principal policy instrument to develop the agricultural potential of the *ejidos*. The Agricultural Bank, thereafter, served only small private landholders. Until 1952 BNCE provided the physical and financial capital to produce commercial crops and established credit societies to channel the working funds to the *ejidos*. About 75 percent of the funds financed the production of basic food crops (corn, beans, rice, chilies, wheat, and potatoes); about 23 percent funded the production of export crops (primarily cotton, coffee, and henequen); and the remainder financed industrial crops (primarily sugarcane, tobacco, sesame seeds, and peanuts).

Moreover, most of the necessary production inputs were provided to the *ejidos* as loans in kind, and their output was marketed through the assistance of BNCE. From 1950 to 1965 about 65 percent of BNCE's loans financed the production of export crops, and 35 percent were used primarily to fund the staples of wheat, corn, and beans. During the 1965–70 period, short-term financing for the production of export crops declined to about 35 percent, and basic food production remained at about 35 percent of the total loans while production loans for industrial crops increased to 20 percent of the total. In its final three years of existence as a credit institution, from 1971 to 1974, BNCE's lending expanded by 100 percent. Although a sizable proportion of its loans supported the production of export crops, the output of sorghum expanded, and more than 60 crops were promoted through production loans. In 1975 the National Bank of Rural Credit was created by merging the three official agricultural banks into a single credit institution providing financial assistance and oversight for both small landowners and *ejidatarios*. About 75 percent of the short-term financing was devoted to production loans for corn, beans, wheat, sorghum, cotton, and henequen, while less than 20 percent of the total was loaned to the livestock sector. The remainder was provided to agricultural processing facilities, such as flour mills and slaughterhouses.

The majority of the agricultural credit provided by private institutions was extended to private farmers, since *ejidatarios* were unable to offer their land as collateral. In spite of the rapid expansion of public credit, however, only about 20 percent of the crop area in the late 1970s benefited from public credit. In general, banks preferred to provide credit to highly productive farms, where the certainty for repayment was relatively assured. In Mexico many private small-scale farmers did not hold a satisfactory land title. Moreover, since more than one-half of private farms and almost one-fifth of *ejido* parcels were less than one hectare and more than one-half of both were smaller than five hectares, their operators did not apply for credit, and credit institutions did not consider them as highly productive farms.

In 1961 the government created the National Company for Popular Sustenance (Compañia Nacional de Subsistencias Populares—CONASUPO) as a means of ensuring that farmers would receive an equitable price for their production of basic food staples. CONASUPO was given the added responsibility of importing food when domestic supplies were short. The government concurrently subsidized the consumption of basic staples by selling them through CONASUPO's numerous retail outlets throughout the country at less than cost. CONASUPO attempted to counteract the influence of intermediaries that bought staples at a low price from producers and sold the products at a higher price. Nonetheless, small producers continued to sell their crops to intermediaries because they almost always provided credit, bought substandard products that had been rejected by CONASUPO, and often lacked transportation facilities to reach CONASUPO's reception centers. During the 1960s guaranteed prices were above market rates, but thereafter the reverse was usually the case, and producers responded by selling to private merchants. Until the inauguration of the Mexican Food System (Sistema Alimentario Mexicano—SAM) in 1980, CONASUPO rarely purchased more than 10 percent of any single crop.

Between 1965 and 1970 the rate of expansion of agricultural production diminished by 2.7 percent a year, and market forces increasingly reoriented production trends. At the same time that urban populations swelled and the incomes of the working class increased (thus creating a growing demand for meat, poultry, grains, and processed foods), agro-industry required increasing amounts of cotton, sugar, sorghum, and soybeans; a growing proportion of feeder cattle, fruit, winter vegetables, and coffee were also being sought by the United States. Without effective government initiatives to contradict the change in market forces, the production of staple commodities began to stagnate or decline in both absolute and per capita terms, while feed crops, livestock, and export products demonstrated an opposite trend.

In 1971 the government responded to the deteriorating agricultural situation by passing the new Law of Agrarian Reform in order to encourage production and increase rural sources of employment. In addition to farming activities, *ejidos* were authorized to develop mining, forestry, fisheries, agro-industry, commerce, and tourism. As agricultural production failed to expand by more than 2 percent during the 1970s, increased volumes of imports became necessary in the early and latter parts of the 1970s.

Adverse weather in 1978 and 1979 necessitated enormous agricultural imports from the United States in 1980. Mexico's oil wealth, however, provided a respite that enabled the country to finance food imports until workable solutions were found. In 1980 López Portillo unequivocally opted for a policy that would promote the cultivation of staple commodities for domestic consumption over export-oriented agriculture. In that year, SAM was enacted with the aim of reducing Mexico's dependence on the United States for food and restoring the country's self-sufficiency in corn and beans by 1982 and in other basic staples by 1985. Petroleum revenues provided the funds to establish an effective and lasting productive base in the country. The principal beneficiaries of the new system were to be the landless and small-scale farmers, who were largely located in the rain-fed areas. In addition, about

19 million malnourished inhabitants in both rural and urban areas were targeted to receive subsidized "basic recommended baskets" of food. Production goals were established for various regions in order to provide the recommended foods. Wheat was emphasized in the north, rice in the tropical Gulf region, and corn in the southeast highlands; beans would complement the consumption of grains in each of the regions. The food was distributed through CONASUPO's numerous retail outlets.

SAM envisioned increasing output through a multidimensional program of incentives. Guaranteed prices increased by more than 92 percent in real terms over the 1979–81 period. Over this period, guaranteed prices were raised by 88 percent for corn and for beans; 53 percent for wheat; 75 percent for rice; and 68 percent for sorghum. The National Bank of Rural Credit increased its credit line by approximately 40 percent from 1979 to 1980. In addition, subsidies were provided for various productive inputs, such as improved seeds, fertilizer, pesticides, fuel, and machinery; for rural processing facilities; and for consumption by lower income groups through CONASUPO's retail outlets. In 1980 the equivalent of about US$2 billion was spent on production subsidies and US$1.5 billion on consumption subsidies.

Seven months after the introduction of the system, López Portillo introduced the Law for Agricultural and Livestock Development of 1981, the legal foundation for the implementation of SAM. This law's principal objectives were to stimulate production and increase productivity among *ejidos* and small-scale private farmers. It empowered these two diverse groups to form alliances, termed "production units," which enabled *ejido* operators to use their land as equity in joint ventures with the larger and generally more efficient private farmers. The opponents to this measure saw it as another vehicle to legitimize the dispossession of the *ejidos* by private groups of greater power (see The Rural Society, ch. 2). Additionally, this law sought to penalize the owners of fallow or idle lands, encouraged crop production on grazing lands, discouraged the atomization of properties into units of less than five hectares, and introduced the concept of risk insurance by which the government compensated producers for the value of their crops in case of crop failure.

Owing to ideal weather in 1981, overall agricultural production increased by record amounts above 1980 output. Corn production increased by 19 percent, and bean output rose by 51 percent. Because the targeted area was located in rain-fed areas, adverse weather in 1982 reduced the output of beans and corn by 26 and 18 percent, respectively. Mexico attained its objective of self-sufficiency in beans, but corn still had to be imported. Critics objected that the program was too expensive in comparison with other alternatives to increasing production. As inflation mounted in 1982, SAM contributed to the overheating of the economy and to the subsequent decline in the standard of living resulting from austerity measures and the 1982 devaluations of the peso. In fact, Mexico became more dependent on food imports from the United States in 1982 and 1983.

Upon his assumption of the presidency, de la Madrid canceled SAM and in October 1983 announced the creation of the National Food Program (Programa Nacional Alimentaria—PRONAL) to coordinate Mexico's agricultural policy. PRONAL's objectives sought to develop domestic food production in both the rain-fed and the irrigated areas. Moreover, the productivity of the food processing industry was slated to be increased, and the marketing of food was to be improved. Diets were to be improved for approximately 30 million persons in 1984 and for 33 million persons by 1988. PRONAL was expected to improve the production and distribution of basic staples and their derivatives. The program emphasized corn, wheat, beans, rice, sugar, vegetable fats and oils, poultry meat, eggs, milk, and fish. In May 1983 guaranteed prices were increased from 40 to 180 percent over 1982 levels in order to compensate producers for rises in input costs.

Agricultural Trade

The proximity of Mexico and the United States provides natural markets for the growing flow of agricultural trade between the two countries. Coffee, cotton, livestock, tobacco, henequen, vegetables, and fruits have traditionally been Mexico's leading agricultural export items. Historically, the United States has been the principal foreign market for Mexico's agricultural exports. Since the 1970s the most dramatic export increases have involved fresh vegetables (such as tomatoes, eggplant, squash, bell peppers, and cucumbers), fruits (citrus fruit, melons, grapes, strawberries, and pineapples), live animals, and animal products.

The United States imports most of its winter vegetables, live cattle, and citrus fruits from Mexico. In the early 1980s vegetables were the most valuable category of exports to the United States. Tomatoes alone accounted for almost half of the value of this commodity trade. Cucumbers, onions, bell peppers, and squash accounted for the next largest export increment in both volume and value.

Fresh and frozen fruit exports progressively increased their share of the United States market. In the early 1980s Mexico exported annually about 311,000 tons, a net worth equivalent to more than US$106 million to the United States. Mexican melons represented over one-half of the fresh fruit exports and about 38 percent of the export value. Pineapples also gained an important part of the seasonal winter trade. Pineapple exports as a proportion of total domestic production increased from 8 to 13 percent at the beginning of the 1980s, and a larger proportion was processed prior to export. Concurrently, fresh citrus and citrus products claimed a larger market share. In the early 1980s the United States imported about 36,000 tons of citrus products annually from Mexico. Oranges and orange juice products were the largest items in this category. Strawberry exports declined in response to production shortfalls and increased United States production. About 97,000 MT of coffee were exported to the United States in 1983, which was about 80 percent of total coffee exports. Another leading growth area in agricultural exports was that of grapes, raisins, and wine. In addition, over one-half of tobacco exports were sold to the United States market. Cotton was the only agricultural export sold largely to other countries; the United States share was about 5 to 10 percent.

In 1960 Mexican agricultural exports averaged about US$335 million annually; they rose to over US$500 million in 1970 and to US$1.7 billion in 1980 before declining to US$1.6 billion in 1983. Although a substantial portion of agricultural exports demonstrated rapid gains in production, their share as a proportion of total exports declined from 50 percent of total merchandise export receipts in 1960 to 37 percent in the early 1970s. By 1980 the value share of agricultural exports was less than 11 percent; this dropped further in 1982 and 1983 to a mere 7 percent. The decline in the agricultural share of total merchandise export value was largely accounted for by the overwhelming growth in petroleum exports and by government policies that promoted manufactured exports.

Serious production shortfalls in 1979 and 1982 transformed the United States-Mexico trade relationship. The widening disparity between output and demand, enhanced oil wealth, and the government's commitment to attaining food self-sufficiency in order to improve the living conditions of the rural poor necessitated the importation of unprecedented quantities of foodstuffs. For the first time, Mexico became a net importer of agricultural products in 1980. Almost all these were imported from the United States.

In 1960 agricultural imports were valued at only about US$85 million. In 1970 the import bill for agricultural products reached US$230 million, but by 1980 import value climbed to over US$3 billion, more than double the figure for the previous year. Betwen 1960 and 1970 the import value increased by only 10 percent per annum. Growth in import value over the 1970s registered a thirteenfold increase and represented a 30-percent growth rate per year. In 1981, following on the heels of three disastrous crop years, agricultural imports reached their highest level on record at US$3.5 billion. In 1982 and 1983 import demand was reduced to US$1.8 and US$2.2 billion, respectively. After a bountiful harvest in 1981, inventory levels began to fall, and imports crept up again in 1983 as the livestock sector suffered setbacks owing to the effects of the economic recession. In both volume and value, agricultural imports rose in spite of austerity measures and foreign currency shortages took effect in 1983. Agriculture's share of total imports rose from 7 percent in 1960 to almost 10 percent in 1970 and 16 percent in 1980. Agricultural import shares dropped in 1981 and 1982 to 14 and 12 percent, respectively, then peaked in 1983 with a 29 percent share.

The principal Mexican agricultural imports from the United States included cereals, oilseeds, livestock and meat products, hides and skins, fruits, and vegetables. The United States share of Mexico's imports grew from 63 percent in 1970 to over 80 percent during the 1980s. In 1983 almost 88 percent of Mexico's agricultural imports were from the United States. United States census data and Mexican port statistics indicated that the United States accounted for nearly all of Mexico's imports of grains (wheat, corn, grain sorghum, and other feed grains), oilseeds, and livestock. Argentina and Canada occasionally supplied a small portion of Mexico's sorghum, wheat, and barley requirements. The small quantities of rice imports were shared during the early 1980s by Costa Rica, Pakistan, and Egypt. Fifty to 70 percent of Mexico's soybean requirements were supplied by the United States, while Argentina and Brazil supplied the remainder.

The United States also supplied most of Mexico's needs of imported cottonseed and sunflower seed. Canada supplied marginal quantities of linseed and rapeseed. Almost 100 percent of the country's oil meals, vegetable oils, vegetables, and hide imports came from the United States. A major import category that was dominated by other suppliers was dairy products. The European Economic Community, Canada, and New Zealand were the principal dairy product suppliers. Among agricultural imports the largest expansion in 1983 occurred in wheat, corn, sorghum, and soybean products. Demand for these items outpaced domestic production as a result of government policies that subsidized consumption at artificially low prices.

Prior to the 1980s Mexico enjoyed a positive balance in its agricultural trade with the world. This surplus valued US$270 million in 1960 and averaged almost US$290 million in the early 1970s before a deficit that averaged over US$1 billion annually was recorded over the 1980 to 1983 period. The agricultural trade balance with the United States followed the same trend. A US$250 million trade surplus with the United States in agricultural commodities turned into a US$1.4 million deficit in both 1980 and 1981. In 1982, however, Mexico recorded an agricultural trade surplus of some US$234 million. In 1983 agricultural imports rose to their third highest level ever, with an estimated deficit of about US$660 million.

In 1980 Mexico established a bilateral trade agreement with the United States in order to ensure the provision of adequate food supplies for its rapidly growing population. This formal trade agreement provided 6 million tons of United States farm commodities in 1981 and 7 million tons in 1982. In 1982 and 1983 credit-short Mexico obtained financial assistance in the form of United States commodity export credit guarantees. The 1983 agreement provided US$1.7 billion in loan guarantees, adding US$400 million to the amount for 1982.

Banking and Monetary Policy

Banking

One of the significant achievements of Mexican economic policy has been the development of a complex financial system that has ranked as one of the most sophisticated among developing countries. By the early 1980s the government determined the direction of the country's economic development through the establishment of credit regulations and the allocation of financial resources to priority sectors of the economy. The Mexican banking system paralleled the Federal Reserve System of the United States and included a similar structure of credit, discount, and reserve requirements as well as open market operations controlled by a central bank. The banking system was regulated by the Bank of Mexico, which is the government-owned central bank. The Bank of Mexico was created in 1925 and was vested with the authority to establish and administer the banking system's reserve requirements, which serve to control the aggregate money supply and the allocation of bank credit, regulate the foreign exchange market, offer private deposit banks discount services, and serve as the fiscal representative of the federal government. The

National Banking and Insurance Commission supervised the Bank of Mexico's operations and was charged with the additional responsibility of overseeing the performance of the country's financial institutions. The Secretariat of Finance wielded a veto power over all banking and monetary policies.

The banking system was divided between development banks and commercial banks. The development banks were composed of special purpose banks that financed agricultural and industrial development, cooperatives, public works, transportation, the sugar industry, the film industry, foreign trade, and low- to medium-cost housing developments. The National Development Bank (Nacional Financiera—NAFINSA) was the principal federal development bank for promoting industrial development in specific development regions of the country. Most of NAFINSA's banking activities were operated through a system of trust funds. A number of these served to capitalize small- and medium-sized industries through the purchase of shares of stock in the companies. They also offered low-cost financial assistance to companies seeking to relocate to priority development regions under the government's industrial decentralization program and provided funds to stimulate the development of priority regions as well as funds for economic feasibility studies. NAFINSA also engaged in several coinvestment projects with foreign banks to assist in the development of new industries. Most of NAFINSA's operations served to supplement the financial resources of private credit institutions and to guarantee the coverage of default risks. NAFINSA also secured loans in the foreign financial markets and re-lent the funds to government decentralized agencies and to private enterprises for investments in such infrastructure projects as irrigation, road construction, seaport development, industrial facilities, and telecommunications. Through its loans and purchase of company equities, NAFINSA came to control many important companies. Mexico's largest steel producer, Altos Hornos de México, was largely owned by NAFINSA. In addition, the bank had important investments in industries concerned with pulp and paper, fertilizer, copper processing, sugar, film, textile, food, beer, chemical, cement, glass, metalworking, and tourism.

The National Foreign Commerce Bank of Mexico was created in 1937 with the objective of acting as the financial representative of the federal government and other public sector entities in the conduct of foreign trade activities. Later, it financed import and export activities and import substitution industrialization activities. It had established a network of some 350 correspondent banks worldwide by 1983. At that time, the government planned to transform it into

Bank of Mexico headquarters, Mexico City
Photo by Arturo Salinas

the country's principal export-import bank.

The National Bank of Public Works was created in 1966 with the objective of financing most of the country's public works projects, federal and residential construction, transportation, and municipal development. The government also channeled investment funds through other official development banks, including the Bank of Cooperative Development, the National Bank of Ejidal Credit, and several other agricultural and livestock development banks (see Government Policy, this ch.).

The Commerce Bank of Mexico and the National Bank of Mexico were the country's two largest depository banking institutions and operated through more than 1,000 branches scattered throughout the country. The commercial banks received most of the country's checking and savings deposits and provided most of the short-term credit. Longer term loans were provided by the commercial banks for capital goods purchases, real estate mortgage loans, inventories, and paying receivables. Long-term loans were usually made for periods ranging from seven to 10 years.

Mexico had an extensive system of private deposit, savings and loan, mortgage, and investment banks until the López Portillo administration nationalized the commercial banking system on September 1, 1982. The government had almost completed the process of indemnifying the shareholders of the nationalized commercial banks by 1984. The indemnification was in the form of interest-bearing, negotiable bonds. The government merged several of the banks during the two years following nationalization in order to increase their efficiency. Thus, the number of banks had been reduced slightly, but otherwise the banking system functioned in a manner similar to that before its nationalization.

At the time the banks were nationalized, the government had promised to return the shares of the nonbanking firms that were owned by the nationalized banks to the private sector. The confidence of the private sector waned as the government delayed the transfer of shares for 17 months. In August 1983, however, the government began to divest itself of its shares in the nonbanking system. The commercial banks had held shares in 467 firms that were valued at about 66 billion pesos. The banks were minority shareholders in most of the firms and held less than 25 percent of the capital in 283 of the firms. The banks planned to sell their shares in only 339 of the firms keeping a controlling interest in those firms that produced services that were complementary to banking operations. The latter group of firms included 43 real estate holding companies that owned the land, buildings, and furniture leased by the banks and 23 firms that conducted credit investigations and managed credit card companies. Among the 339 firms to be affected by the planned divestiture, 142 were involved in manufacturing, 115 in the service sector, and 13 in construction. The remaining 69 firms were nonbanking financial intermediaries. Former bank shareholders were given priority in bidding for the shares and were allowed to use their indemnification bonds as payment. The firms were offered for sale to the private sector in the form of packages that combined the shares of some good and some poorly performing companies in order to prevent the private sector from buying the best performing company shares and forcing the government to operate or liquidate the poorer performing companies.

The Mexican Stock Exchange offered a minor source of capital funds for Mexican companies; the majority of firms relied on bank credit and retained earnings to finance their investments. Most of the transactions in the stock exchange involved fixed-income securities; sales of treasury certificates accounted for more than 85 percent of the peso value of business in 1983. From mid-1982 to mid-1984, the stock price index was on a bullish upswing from about 500 to around 3,500. The Mexico Fund was listed on both the New York and the London stock exchanges and was composed of shares of 215 companies that were listed on the Mexican Stock Exchange. Trading volume of the 90 to 100 stock issues traded regularly averaged over 100 million shares per month in 1984, representing about a tenfold increase to the volume amount traded during the mid-1970s.

In 1972 the government introduced a new regulation that required foreign banks and other financial institutions interested in establishing operations in Mexico to register with the Secretariat of Finance. Moreover, banks with full-time representatives in Mexico were required to submit monthly reports on their Mexican operations to the Bank of Mexico. In 1983 over 500 foreign banks were operating in Mexico. Of these, only Citibank was permitted to receive deposits from the public.

In 1983 the government passed a law that allowed new institutions, called national credit societies, to conduct banking services. The objectives of this initiative were to decentralize banking activities, promote domestic savings, channel credits to the sectors in need of credit, expand the capital market, and permit private individuals to participate in the operation of 34 percent of all banks and credit institutions.

Monetary Policies

The size of the Mexican financial system, measured as a ratio of the total money supply to GDP, increased from 10 percent in 1955 to more than 30 percent in the early 1970s and reached 35 percent by 1982. During the 1970s the government attempted to obtain financial resources at a minimal cost in terms of debt service payments and set high reserve requirements and mandatory credit allocation schemes for the national banking system. During the 1955–70 period, required bank reserves remained stable at about 33 percent of deposits. By 1980 the reserve requirements had increased to 66 percent. Real interest rates paid to depositors were negative in all but three of the 12 years between 1972 and 1984.

Earlier policies were reversed in line with the government's stabilization program. By 1983 the banking system was required to maintain nominal deposit rates that were roughly on a par with current and expected inflation in order to restore the inflow of domestic savings into the banks and to reduce the inducements to capital flight. Three-fourths of commercial bank deposits were subject to legal reserve requirements or mandatory credit allocations to priority sectors. Interest rates on the remaining portion of loanable funds had to be very high after 1981 in order to allow the banks to recover a part of their costs in carrying assets that bore below-market interest rates. These initiatives were also directed toward reducing the spread between loan and deposit interest rates. When inflation rates declined, short-term deposit rates were reduced.

In 1983 the total money supply increased at a slower rate than inflation. The monetary base increased about 56 percent in 1983, compared with a growth of 96 percent during 1982. In real terms, however, the monetary base shrank by about 14 percent in 1983. A tight monetary policy was translated into a reduction of the inflation rate over the course of 1983.

Total deposits in the banking system rose by about 61 percent in 1983, in comparison with an increase of 12 percent during 1982. This increase, however, represented a real decrease of 11 percent. Short-term peso deposits increased by about 118 percent in 1983, and long-term deposits declined by about 30 percent. The total amount of loans financed by the banking system in 1983 increased by only 52 percent, a decline of about 16 percent in real terms, over levels for the previous year. The public sector accounted for 77 percent of total financing, and the private sector received 23 percent. Financing increased over 1982 levels by 52 percent for both the private and the public sectors. Domestic interest rates, or the banks' average cost of funds (which is similar to the United States prime rate), was about 51 percent in early 1983 and rose to 55 percent by December 1983. The effective interest rate—which includes interest charges, fees, and minimal balance requirements on unsubsidized peso loans to the private sector—started 1983 at 78 percent, increased to more than 100 percent in June, and declined to about 91 percent at the end of the year. Ninety-day treasury bills started 1983 at about 60 percent and ended the year at about 54 percent.

Foreign Trade

Geographical proximity to the United States offered advantages to many of Mexico's export industries, including a ready source for needed technology transfers and other necessary imports. Between 1960 and the early 1980s Mexico had maintained a consistent trade deficit with the industrialized countries. Mexico's trade policy had been oriented to protect domestic industry, which periodically resulted in import controls and acted as a bias against export expansion. During the 1960s import controls were added to about 1,000 import categories annually, while export incentives were negligible. Concurrently, exports were negatively affected by the overvaluation of the peso. Overall, agricultural and mining exports only increased by 2 percent during the 1960s because of negative effective protection. Agriculture suffered as a result of low protection and rising input costs, while minerals were subject to an export tax. Manufactured exports, however, grew by about 5 percent annually in response to effective import controls.

During the early 1970s manufactured exports increased rapidly as a result of beneficial policies that allowed duty-free imports on necessary inputs, short-term export credits, and other export-oriented financial schemes. In addition, *maquiladoras*, or in-bond industries that were generally labor intensive and United States owned and produced goods in Mexico for reexport to the United States, were established in 1965. By the mid-1970s *maquiladora* exports earned over US$500 million. As the peso became increasingly overvalued and the balance of payments situation deteriorated during the mid-1970s, import controls expanded, and tariffs were raised which had detrimental effects on manufactured and primary exports. Following the 1976 and 1977 devaluations, nonpetroleum exports became more competitive internationally, and the tripling of oil exports after the discovery of large oil deposits led to a period of import liberalization over the 1977–79 period. Under Mexico's system of fixed exchange rates, however, excess public spending caused the peso to become overvalued again, and protectionist measures increased. By 1979 the earlier export stimuli measures had been overshadowed by the appreciation of the peso, which made imports attractive and eroded the competitive position of Mexico's manufactured and non-oil primary exports. Furthermore, the combination of these adverse effects and domestic pressures against further import liberalization culminated in López Portillo's decision that Mexico not become a member of the General Agreement on Tariffs and Trade (GATT) in March 1980. By the early 1980s non-oil exports accounted for only one-fourth of total exports. Tight import controls and dampened internal demand largely reduced the level of imports. In 1982 the peso was devalued and the competitiveness of Mexican exports was restored.

De la Madrid committed the government to a freer trade policy for exporters by eliminating temporary import controls, providing foreign exchange to exporters at the controlled rate of exchange; reinstating duty-free import provisions to the *maquiladora* system that had been stopped after the 1982 devaluations; eliminating export taxes on a number of agricultural products; reducing the number of export items that required export licenses;

and cutting some of the red tape that had hindered exports. At the same time, a host of selective trade liberalization measures were enacted in 1984 to promote exports and ensure access to needed imported inputs.

Imports

Mexican trade statistics indicated that total merchandise imports in 1983 amounted to US$7.7 billion, or 68 percent less than the record of US$23.9 billion reached in 1981. Total imports were composed of consumption goods worth US$555 million, intermediary goods worth US$5.3 billion, and capital goods worth US$1.8 billion. Approximately US$1.6 billion consisted of agricultural crop imports, US$76 million of livestock and fish products, US$105 million of metals and minerals, and US$5.8 billion of manufactured goods. US$524 million of the latter were agricultural products destined for Mexico's food industry, US$32 million were textiles, US$1.2 billion were chemicals, US$2.9 billion were machinery, US$386 million were steel products, and US$728 million were attributed to other miscellaneous goods. About US$4.2 billion worth of goods were imported by the public sector, and US$3.5 billion were imported by the private sector.

The United States was Mexico's largest import supplier with a value of US$4.8 billion in 1983 and accounted for 63 percent of total import value. United States trade statistics, however, recorded a Mexican import value of US$9.1 billion in 1983. The discrepancy arose because Mexican trade statistics did not include the *maquiladora* trade and the United States-Mexico border trade in their merchandise accounts. Among the leading imports from the United States were corn, sorghum, motor vehicle parts, soybeans, automatic data processing parts, paper and paperboard, and sunflower seeds. Mexico imported US$372 million from West Germany, US$371 million from France, US$359 million from Japan, US$233 million from Canada, US$173 million from Britain, US$171 million from Spain, US$170 million from Italy, and US$139 million from Brazil.

Exports

In spite of the importance that export earnings have held in Mexico to finance the country's industrialization drive, non-oil exports largely stagnated during the latter part of the 1970s. The difference was made up by the petroleum sector, which accounted for 75 percent of Mexico's exports in 1983. Moreover, 1982 and 1983 represented the first time in some 40 years that Mexico recorded a positive trade balance. In 1983 the total value of Mexico's exports amounted to US$21.4 billion, which was roughly equivalent to the import value during 1982. Mexico's most lucrative export was petroleum, valued at about US$14.8 billion in 1983, or 5 percent less than in 1982. A 33-percent increase in manufactured exports compensated for the decline in petroleum exports. In 1983 Mexico exported US$4.5 billion worth of manufactured goods, of which industrial food products accounted for US$707 million; textiles, US$160 million; chemicals, US$607 million; machinery, US$915 million; steel, US$283 million; and other export products, US$1.8 billion. Metals and minerals represented US$447 million; livestock and fish, US$221 million; and agriculture, US$1 billion. Approximately US$17.3 billion of Mexico's exports derived from the public sector and US$4 billion from the private sector.

The United States was also Mexico's largest export market and accounted for US$12.4 billion in 1983, or 58 percent of total export value. United States trade statistics indicated that Mexico exported US$16.8 billion to the United States. Mexico's major exports to the United States consisted of petroleum, automotive engines, silver, shrimp, coffee, and winter vegetables. After the United States, Spain was Mexico's most valuable export market with US$1.6 billion, followed by Japan, US$1.4 billion; Britain, US$856 million; France, US$821 million; Brazil, US$635 million; Canada, US$467 million; West Germany, US$260 million; Nicaragua, US$154 million; and the Dominican Republic, US$150 million.

Balance of Payments

Between 1980 and 1983 the balance of payments fluctuated from a deficit on current account to a surplus in 1983, while the capital account balance did the reverse (see table 15, Appendix). The merchandise balance had been characterized by a rapid and steady growth in the value of petroleum exports, from US$9.4 billion in 1980 to US$15.6 billion in 1982, before declining to US$14.8 billion in 1983. Nonpetroleum exports largely stagnated at about 25 percent of merchandise exports but rose from US$5.6 billion in 1982 to US$6.6 billion in 1983. The trade balances in 1982 and 1983 were positive for the first time in several years by US$6.8 billion and US$13.7 billion, respectively. The primary reason for the surplus in the merchandise trade account was the result of a severe contraction in imports arising from import controls and diminished economic activity in Mexico. Although the import controls were lifted in the latter part of 1983, demand for merchandise imports remained very low.

The nonfactor services account also demonstrated wide swings during the period in response to diminished economic activity and from the effects of the changing peso-to-dollar exchange rates. Border trade went from a positive balance of US$590 million in 1980 to deficits of US$141 million in 1982 and US$170 million in 1983. As long as the peso was overvalued, thus making the dollar cheap relative to the peso, Mexico took in more in frontier sales than Mexicans spent across the border in the United States. The gap in border trade was reversed as the peso depreciated against the dollar, making it more expensive for Mexicans to buy goods in the United States. Tourism followed the same trend. Mexican tourists increased their spending abroad by 50 percent from 1980 to 1981 but curtailed their tourist spending after the devaluations of the peso in 1982. However, the net flows from tourism shifted in Mexico's favor in 1983, recording a positive balance of US$1.2 billion. Mexico earned about US$830 million from the *maquiladora* assembly industries along the Mexican side of the border in 1983. This amount was slightly lower than in 1982 but still higher than during any period before 1981.

The resource balance was positive during 1982 and 1983 by US$5.4 billion and US$14.2 billion, respectively. However, the deficit from public sector interest payments rose from US$4 billion in 1980 to US$8.4 billion in 1982 and US$7.3 billion in 1983. Remitted profits declined from a deficit of US$642 million in 1982 to only a small deficit of US$184 million in 1983. Transfer payments were positive and increased from US$275 million in 1980 to US$356 million in 1983. Thus, the current account balance went from a deficit of US$7.2 billion in 1980 to a deficit of US$12.5 billion in 1981. In 1982 the deficit declined to US$4.9 billion and by 1983 had turned into a surplus of US$5.5 billion.

Between 1973 and 1982 the current account deficits were balanced by capital inflows. In 1980 the capital account balance increased by 163 percent over 1979 levels to almost US$12 billion. In 1981 the surplus in the capital account balance rose to US$21.9 billion, then declined to US$8.6 billion in 1982. In 1983 more capital left the country than was obtained from abroad, and a deficit of US$854 million was recorded. Net long-term capital inflows amounted to US$5.6 billion in 1980, US$10.5 billion in 1981, and US$9.7 billion in 1982 and then declined to US$3.8 billion in 1983. Under long-term capital accounts, foreign direct investment declined from a record of US$1.3 billion in 1980 to US$374 million in 1983. During 1980 and 1981 short-term capital inflows totaled US$5.1 billion and US$10.2 billion, respectively, the largest inflows on record, and were primarily used to support the highest deficits in the current account on record. In 1983 the short-term capital account was negative at US$5 billion, suggesting that the private sector reduced some of its foreign indebtedness and that there had been a partial restoration of foreign dollar balances on Mexican-dollar accounts drawn down during the liquidity crisis of 1982.

Between 1980 and 1983 the errors and omissions category in the balance of payments demonstrated a substantial improvement. The negative balance in this item was often used as an indicator of capital flight. From US$3.6 billion in 1980, this category rose to US$8.3 billion in 1981, declined to US$7 billion in 1982, and registered only US$1.6 billion in 1983. Mexico's gross foreign exchange reserves went from a surplus of US$1.2 billion in 1980 to a deficit of US$3.2 billion in 1982. In 1983 reserves were positive, with a balance of US$3.1 billion. This balance was largely achieved by a positive current account balance, a negative capital balance, and a sharp decline in outflows under the errors and omissions item. During 1980, however, the large current account deficit was covered by large inflows of capital that served to mitigate the negative effects of a large negative balance in errors and omissions.

* * *

Clark W. Reynolds' *The Mexican Economy: Twentieth Century Structure and Growth* and "Why Mexico's 'Stabilizing Development' Was Actually Destabilizing (with Some Implications for the Future)" are excellent overall sources on the Mexican economy. The United States Department of Commerce's *Foreign Economic Trends and Their Implications for the United States: Mexico* provides current statistics and information on recent policy measures. The preprints from the United States Department of the Interior's *Bureau of Mines Minerals Yearbook* provides annual statistics and information on mineral production, trade, and reserves and highlights the performance of numerous minerals. John J. Bailey's "Public Budgeting in Mexico" in *Public Budgeting and Finance* provides a good overview of public budgeting in Mexico with an emphasis on the 1970–81 period. The *Informe Anual* from the Banco de México supplies an informative overview of the economic situation. NAFINSA's *La economía méxico en Cifras* provides a mass of historical statistics on the overall performance of the economy. Thomas G. Sanders' frequent articles on petroleum and natural gas are excellent sources on describing Mexico's energy sector.

P. Lamartine Yates' *Mexico's Agricultural Dilemma* offers the most comprehensive treatment of the agriculture sector. The publications of the Foreign Agricultural Service of the United States Department of Agriculture provide current information on agricultural production, trade, and policy issues. Myles J. Mielke's "Dimensions of U.S.-Mexican Agricultural Interdependence" is very useful in describing Mexico's agricultural trade development during the 1970s and early 1980s. Two excellent sources on agrarian reform legislation are *Estructura agraria y desarrollo agrícola en México: estudio sobre las relaciones entre la tenencia de la tierra y el desarrollo agrícola en México* by Sergio Reyes Osorio et al. and *El agrarismo mexicano y la reforma agraria: exposición y crítica* by Jésus Silva Herzog. John J. Bailey and John Link's "Statecraft and Agriculture in Mexico, 1980–82: Domestic and Foreign Policy Considerations" provides an excellent overview of Mexican agricultural policy. (For further information and complete citations, see Bibliography.)

Chapter 4. Government and Politics

TIERRA Y LIBERTAD

Revolutionary leaders from three regions of Mexico behind banner reading "Land and Liberty," adapted from a mural by Diego Rivera

THE KEY TO UNDERSTANDING the Mexican political system lies in its origins in the social upheaval of the Revolution of 1910–1917. That historical event swept clean the slate of Mexican society and politics and forged a national awareness that previous upheavals in Mexico's turbulent history had failed to do. When the fighting ended after 1917, the political system that was constructed by the victors over the next 20 years justified its existence—and the government justified its actions—through constant reference to the Revolution. Candidates to high office, as well as government policy itself, were sanctioned by an alleged orientation to "Revolutionary ideals." The legitimacy of the system that grew out of the Revolution was based on its capacity to present itself as the Revolution's only authentic successor.

The goals of the Revolution were expressed in the Constitution of 1917, which gave new meaning to democracy, economic development, and social justice. It set goals that provided a reference point for all subsequent administrations. Every Revolutionary leader bestowed an aura of sanctity on the Constitution of 1917, for within it were found not only the expression of the hopes of the many who fought the Revolution for economic and social justice but also enough contradictory provisions to allow them almost unlimited freedom to do whatever they wished while providing the country with a constant reminder of the meaning of the Revolution.

Similarly, every president was a "great Revolutionary"; he was Olympian in his superiority over all other elements in the country. Each successive president represented historical continuity within the Revolution. It was he who decided which goals of the Revolution would be emphasized during his term, and it was to him that Mexicans looked for justice. All actions of government were taken in his name; no other officials so captured the public eye. For many years he was never criticized, his failures being attributed not to him but to those who surrounded him. His place at the apex of life in Mexico made him the most effective, perhaps the only possible, repository of the aspirations of the workers and peasants in whose name he governed.

If the president was the leader of the Revolution, the Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI) was its institutional expression, for it gathered within it all the forces of the Revolution. It was the mechanism of social control, recruitment, and electoral activity. Through its sectors and subsectors it provided representation for labor, peasants, and other groups. As each new leader emerged to take over the leadership of the Revolution, it was the party that legitimated the choice by conferring on the president the mantle of Francisco (Pancho) Villa, Emiliano Zapata, Venustiano Carranza, Álvaro Obregón, Francisco I. Madero, and the other heroes of the Revolution. Through the manipulation of these symbols the political elites of the country managed the contradictions of their politics, making it possible to promise land to peasants while deploying troops to remove peasants from the land; to give a prominent place to organized labor while pursuing economic policies under which income inequality grew; and to enshrine personal freedom of political opinion while systematically repressing political organizations that operated independently of the limits allowed by the political elites.

In mid-1984 the country was experiencing a difficult period of economic austerity occasioned by balance of payments difficulties caused largely by an estimated US$80 billion foreign debt. In 1982, in return for assistance from the International Monetary Fund, the country agreed to a set of economic measures designed to reduce inflation and to improve its balance of payments, including successive devaluations of its currency and cutbacks in government spending. These measures led to the bankruptcy of many firms and a consequent increase in unemployment.

These economic problems severely strained the political consensus by which the country had been governed since the 1930s. The middle class, increasingly disaffected by widespread corruption and declining living standards, voted in unprecedented numbers for opposition parties, although not in sufficient numbers to threaten seriously the commanding position of the PRI. Organized labor, traditionally one of the government's primary supports, grew increasingly restive as wage increases fell far short of the rate of inflation (see Labor Force, ch. 3). The official labor movement confronted the government and employers in an unprecedented series of conflictual wage negotiations early in 1983. However, by mid-1983 the government appeared to have gained the upper hand by successfully playing off the different labor federations against each other. Labor relations were much less conflictual in 1984, as labor leaders came to support the government's economic stabilization program in a move to protect the jobs of their constituents.

The economic crisis also led to a questioning of the economic model of import substitution industrialization and strong state participation that the country had followed since the 1940s (see Growth and Structure of the Economy, ch. 3). In 1984 the PRI was internally divided. Its traditional politicians, who maintained ties with the party's traditional bases of support in organized labor and the peasantry but who had lost influence with the government after 1970 to educated professionals in economics and public administration, favored a return to the traditional style of populist politics. Another faction, frequently allied with the traditional politicians against attempts at party reform, favored an increased state role in the economy. Yet a third faction, which appeared to be in control of the economic policy of the administration of President Miguel de la Madrid Hurtado, favored a larger role for the private sector. In mid-1984 de la Madrid appeared to be successfully managing this conflict; the party was discussing reforms of its internal structure that were designed to alleviate discord.

The major foreign policy problems facing the de la Madrid administration in mid-1984 were difficult negotiations with the United States concerning trade and fishing rights and relations with the countries involved in the conflicts in Central America. Mexico continued to seek greater access to United States markets for its exports but resisted United States pressures to join the General Agreement on Tariffs and Trade. The dispute over fishing rights within Mexico's territorial waters, which occasioned a United States boycott of Mexican tuna in 1980, continued in 1984.

The de la Madrid administration pursued a policy of seeking to mediate the Central American crisis through bilateral and multilateral negotiations. Thus, Mexico participated actively in the Contadora Group, along with Panama, Venezuela, and Colombia. De la Madrid continued Mexico's good relations with Cuba and tried to arrange direct negotiations between the United States and Cuba as well as between the United States and Nicaragua. In mid-1984 the countries of the region were considering a draft treaty produced by the Contadora Group.

Institutional Structure

The Government

Constitution of 1917

In November 1916 delegates representing the many military and political factions that emerged during the violent phase of the Mexican Revolution were assembled by Carranza in Querétaro to draft a new constitution to replace the largely ignored constitution of 1857 and to end the fighting. The constitution that was promulgated on February 5, 1917, thus represents a political bargain struck by contending armies and as such includes various contradictory provisions representative of the heterogeneity of the groups that wrote it. It supports socialism, capitalism, political democracy, authoritarianism, corporatism, interest-group liberalism, and a host of unimplemented provisions for specific social reforms.

Formally, the Constitution prescribes a federal republic consisting of 31 coequal states and the Federal District, which manage their own internal affairs. The federal government is divided into three branches: the executive, the legislative, and the judicial, which are not coequal. Only the president may promulgate a law, by signing it and ordering its publication. He can veto legislation passed by the legislature, either in whole or by item, and although his veto may be overridden, there is no constitutional way in which he may be forced to promulgate legislation. In addition, executive-sponsored legislation submitted to the legislature takes precedence over other business, and the Constitution gives the president wide authority to issue basic rules *(reglamentos)* that give effect to the more general provisions of a statute. Such rules have the same legal force as the statute itself and are the form in which most Mexican laws have appeared.

The Constitution treats many matters of public policy explicitly. For example, Article 27 prohibits foreigners and churches from owning property and assigns original ownership of land, waters, seas, natural resources, and sources of power and fuel to the nation. Religious groups are excluded from any kind of political activity and may not participate in public education, conduct services outside churches, or wear clerical dress in public. Article 27 also empowers the government to expropriate private property in the public interest and, particularly, to redistribute land.

The Constitution prescribes an activist state to ensure national autonomy and social justice. Thus, in addition to a charter of individual rights, the Constitution provides for a number of social rights for workers and peasants and their organizations. In Article 123 the Constitution provides what political scientist Roger D. Hansen has described as "the most advanced labor code in the world at its time." It guarantees the right to organize, the eight-hour day, and the protection of women and children workers; mandates that the minimum wage "should be sufficient to satisfy the normal necessities of life of the worker"; establishes the principle of equal pay for equal work regardless of sex or nationality; and obliges employers to provide housing for their employees. In addition, Article 123 clarifies the right to strike. Strikes are legal when their purpose is to "establish equilibrium between the diverse factors of production, harmonizing the rights of labor with those of capital." The article further establishes arbitration and conciliation boards made up of equal numbers of management and labor representatives plus one government representative. Although many of these provisions were not implemented until 1931, Article 123 mandated the incorporation of organized labor into the Mexican political system and served as a basis for its claim to a preeminent political position.

The Executive

In mid-1984 the executive branch of the government consisted of the president of the republic, the administrative structures of the country, and some 376 government-owned businesses and semiautonomous corporations. Generally, policymaking was an intrabureaucratic process involving little public debate.

At the apex of the government is the president, elected by direct popular vote to a *sexenio* (six-year term of office), beginning December 1. He may never be reelected. If the office falls vacant during the first two years of a *sexenio*, a new general election must be held; after the first two years the legislature elects a successor who completes the term (there is no vice president). The president must be a male who is at least 35 years old at the time of his election and not only a Mexican citizen by birth but also the son of Mexican citizens by birth. He must have lived in the country during the entire year preceding his election. He must neither have held office in the cabinet nor have been a governor or on active military service for six months prior to his election. No priest or minister of any religious denomination may ever hold public office, including the presidency. In mid-1984 the president was Miguel de la Madrid Hurtado, who served for the 1982–88 *sexenio*.

The president has a wide variety of powers conferred by the Constitution and may freely appoint and dismiss secretaries (as cabinet officials are termed), the attorney general of the republic, and the attorney general of the Federal District. Subject to Senate ratification, he appoints ambassadors, higher employees of the secretariats, consuls general, high-ranking military officers, and justices of the Supreme Court. Subject to ratification by the Chamber of Deputies,he appoints the magistrates of the Supreme Court of Justice of the Federal District. The president appointed some 18,000 officials in the early 1980s. As military commander in chief, he may conduct military action against other nations or internally to preserve order. He has broad powers in foreign policy and may request before the Chamber of Deputies the dismissal from office of any of the justices of the Supreme Court, the circuit courts, the district courts, and all Federal District judges. Finally, the Constitution confers on him the power to grant pardons.

In mid-1984 ordinary law conferred on the president the power to name the directors and assistant directors of the semiautonomous agencies of the federal government, intervene in industrial or commercial activities related to the production or distribution of goods and services, control monetary policy, control and regulate foreign investment, intervene in the education system to formulate plans and programs for teacher training, compile and update textbooks for primary education, grant and revoke concessions for radio and television channels, and influence the national press through the supply of newsprint controlled by the state-owned newsprint-producing and -importing company.

In carrying out these responsibilities, the president was assisted by a cabinet (see fig. 10). Seldom, however, did it meet as a body; usually the president held frequent sessions with each secretary. The scope of decisionmaking granted to each secretary was determined by the will of the president. On broad questions of policy it was common for the president to name a committee consisting of representatives of the secretariats concerned, spokespersons for any nongovernmental interest that might be involved, and members of his own staff. Despite the often wide leeway granted to individual secretaries, it was the president who formally initiated the policy process by declaring his interest, and it was the president who had the final word on all questions if he chose to exercise it.

The various secretariats were not equal in power or influence. The two most important were those of government and of programming and budget. The Secretariat of Government (sometimes referred to in the literature as Secretariat of Interior) controlled federal-state-local government relations, liaison with the legislature, elections, voter and party registration, immigration and emigration, film production and theaters, television and radio noncommercial airtime, the federal police, and federal prisons. The central position of this secretariat in political management made it a powerful stepping-stone to the presidency; of the five presidents between 1946 and 1976, four had been secretary of government in the previous *sexenio*.

The Secretariat of Programming and Budget was a comprehensive planning and budgeting system created in 1977 to gain control over government spending and the administrative structure, which had become extremely fragmented. In 1984 it

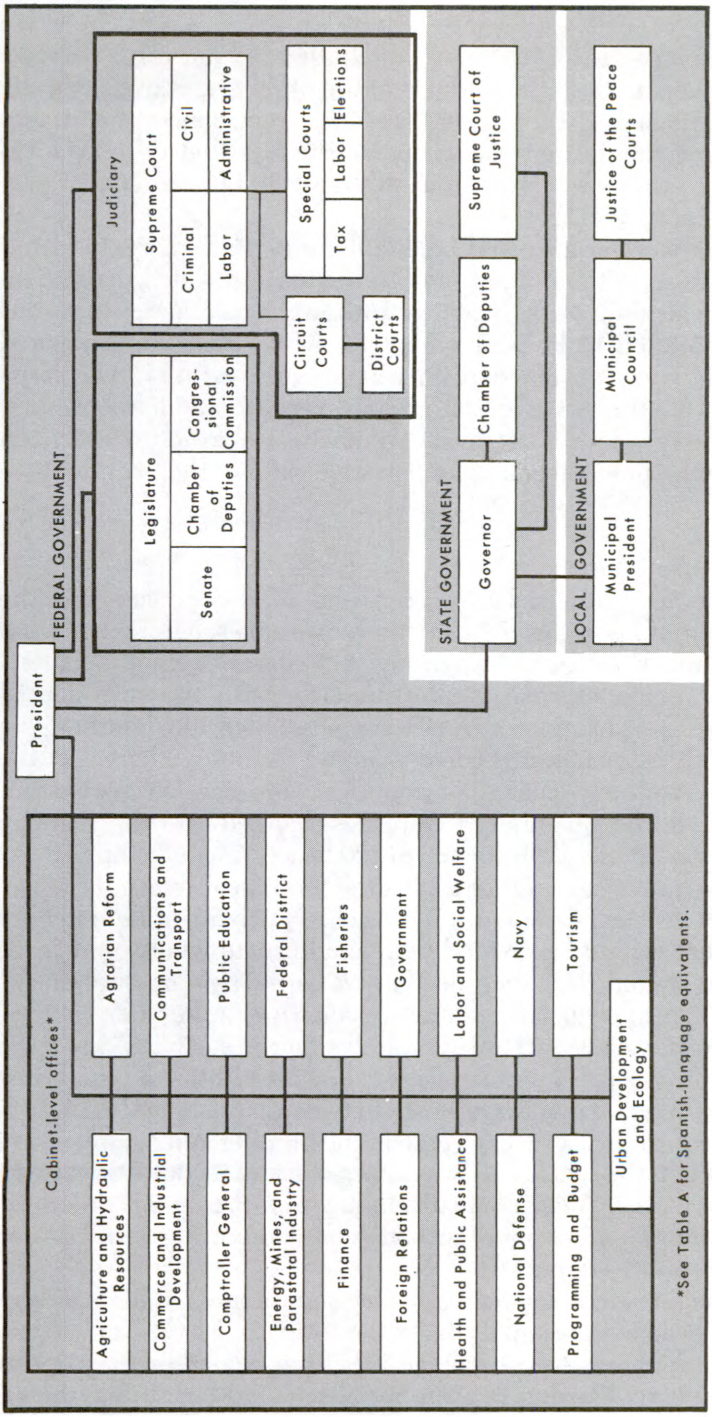

President
FEDERAL GOVERNMENT
Judiciary
Supreme Court
Criminal
Civil
Labor
Administrative
Special Courts
Tax
Labor
Elections
Circuit Courts
District Courts
Legislature
Senate
Chamber of Deputies
Congressional Commission
STATE GOVERNMENT
Governor
Chamber of Deputies
Supreme Court of Justice
LOCAL GOVERNMENT
Municipal President
Municipal Council
Justice of the Peace Courts
Cabinet-level offices*
Agriculture and Hydraulic Resources
Agrarian Reform
Commerce and Industrial Development
Communications and Transport
Comptroller General
Public Education
Energy, Mines, and Parastatal Industry
Federal District
Finance
Fisheries
Foreign Relations
Government
Health and Public Assistance
Labor and Social Welfare
National Defense
Navy
Programming and Budget
Tourism
Urban Development and Ecology
*See Table A for Spanish-language equivalents.

Figure 10. Government Structure, 1984

was responsible for coordinating both medium-term sectoral economic plans and the budgets of the other secretariats with its own National Development Plan. The importance of this secretariat was indicated especially by the fact that de la Madrid moved to the presidency from the position of secretary of programming and budget.

The secretariats could be divided into those that articulated the interests of their clients and those that controlled them. Secretariats dealing with business and large-scale agricultural interests tended to be representative, while those for labor and peasants were designed primarily to control them. The large number of interests at least nominally represented in the cabinet tended to produce a fractured administrative structure balanced only by the political and administrative skills of the president.

Legislature

The federal legislature consisted of the Senate and the Chamber of Deputies. In 1984 there were 64 senators, two from each of the 31 states and two from the Federal District. Senators' terms ran for six years, coterminously with the presidential *sexenio*. The Chamber of Deputies consisted of 400 deputies who served three-year terms corresponding to the two halves of the *sexenio*. Neither senators nor deputies could stand for reelection. The size of the Chamber of Deputies changed over the years; in 1977 it was increased from 300 to 400 to accommodate opposition party deputies selected as a result of a political reform (see The Rules of Political Competition, this ch.). Each incumbent in both chambers was also provided with an alternate who would serve actively should the office become vacant. The Constitution requires that the legislature be in session from September 1 to December 31 each year. However, between the early 1970s and the mid-1980s the president typically called for additional special sessions lasting two months or more between January and August in order to deal with a vast increase in the number and complexity of bills. When the legislature was not in session, its duties were carried out by the Congressional Commission. Previously called the Permanent Commission, this body consisted of 30 members—15 senators and 15 deputies.

The president dominated the legislature through his legal position as head of state and leader of the PRI. The party invariably occupied every Senate seat save one that was gained by the Popular Socialist Party (Partido Popular Socialista—PPS) in 1976 as the result of a bargain with the PRI in the state of Oaxaca. In addition, the

PRI controlled the Chamber of Deputies, despite the effort to increase opposition party representation. Three hundred deputies were chosen by election in single-member districts after 1977, and 100 were chosen by proportional representation. In 1984 all but one of the 300 directly elected seats were held by the PRI; the remaining 101 seats were divided among the opposition parties.

Individual members owed their nomination by the PRI directly to the president, who traditionally selected all of the Senate candidates and was the major influence on the selection of PRI candidates for deputy. This, together with the prohibition on their reelection, prevented the development of a legislature independent of the president. As of 1984 the legislature had never failed to pass a bill proposed by a president and had never overridden a presidential veto or passed a bill opposed by a president.

The legislature did, however, serve certain purposes. In addition to providing at least the appearance of popular representation in policymaking, the debate in both chambers produced technical modifications to presidential legislation. This was particularly true under de la Madrid, whose first legislative package presented in December 1982 went through substantial modification before passage. The legislature ensured patronage posts used to reward loyal PRI members, provided experience for those moving up through the political system and, in the case of the Senate, provided symbolic representation for the factions representing former presidents. In the Chamber of Deputies it provided representation for the sectors of the PRI and drew opposition leaders into direct responsibility for government policy.

Judiciary

The judicial system was divided into a federal court system and a state court system. The federal courts had jurisdiction over most civil cases, particularly suits involving contracts, finance and banking, labor-management relations, corporations, and both interstate and intrastate commerce. State courts had jurisdiction over suits involving minor sums of money and divorce cases. In criminal law, federal courts handled bank robberies, kidnappings, and most major felonies, with the exception of murder cases, which were heard by state courts. Interpretation of the Constitution was the prerogative of the federal courts. However, the civil law tradition that judges should simply apply the law as written rather than sit in judgment of its validity limited the activity of the federal courts in constitutional matters to hearing cases involving the writ of *amparo*. (see Glossary), similar to habeas corpus.

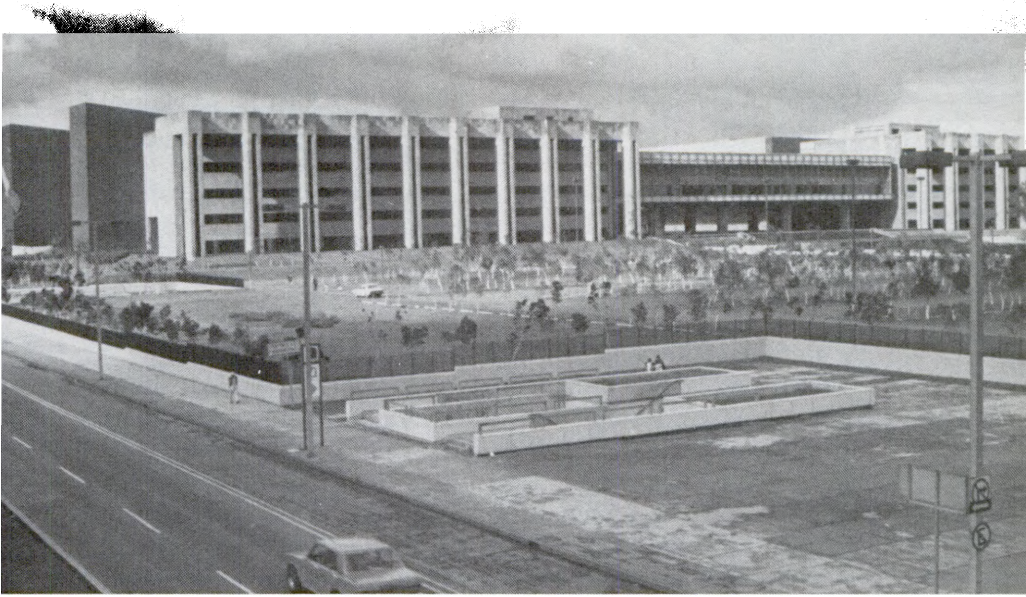
Writs of *amparo* were issued by federal justices on behalf of citizens who claimed that their constitutional rights had been violated by a government official. Issuance of the writ stayed government action in the matter until the Supreme Court could decide the case. The great bulk of litigation was based on the writ.

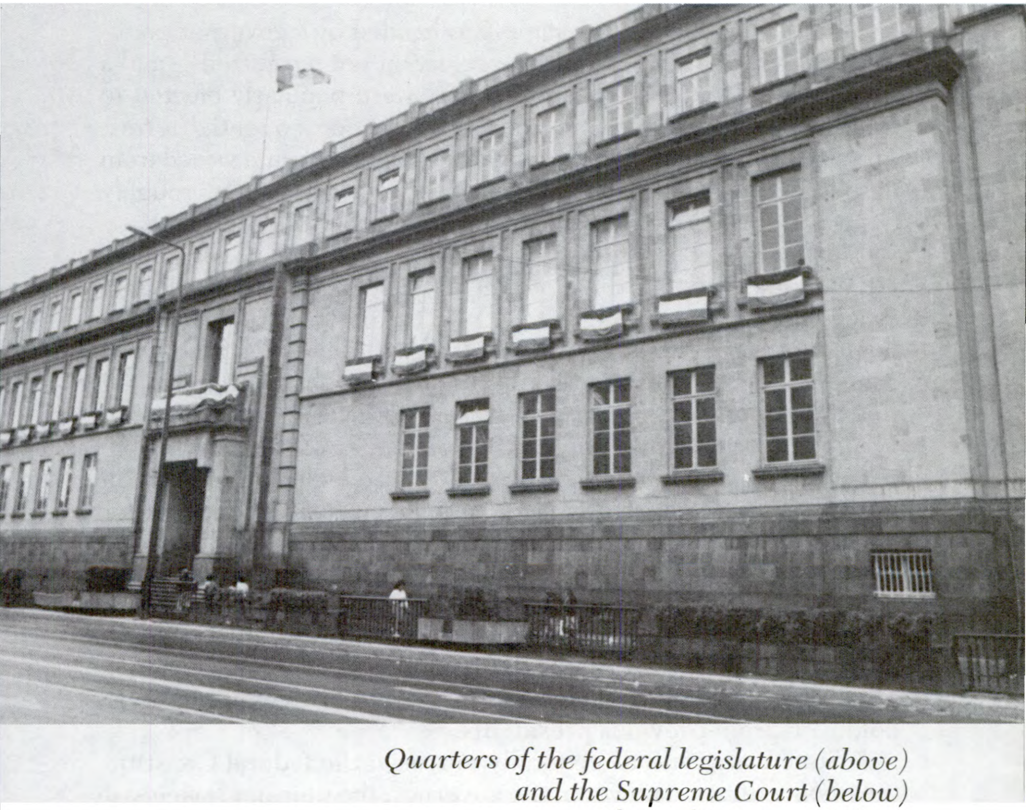
Federal courts were organized in three tiers. At the highest level was the Supreme Court, which consisted of 26 justices, one of whom was selected by his colleagues to serve as chief justice. The other justices were grouped into four separate chambers: criminal, civil, labor, and administrative. Supreme Court justices were selected by the president and confirmed by the Senate; since 1929 have all been members of the PRI. They had to be native-born citizens between the ages of 35 and 65, have held a degree in law for at least five years, never been convicted of a crime punishable by more than one year of imprisonment, and lived in the country for five years prior to selection, except for periods not exceeding six months spent abroad on official duties. Clergymen were prohibited from sitting on the Supreme Court. Legally, Supreme Court justices served for life but were subject to impeachment by the Chamber of Deputies. In practice, however, they submitted their resignations at the beginning of each *sexenio*.

Below the Supreme Court were 16 circuit courts *(tribunales de circuito)*, consisting of three justices who were designated by the chief justice and who served four-year terms unless granted tenure by the president. They sat individually when hearing appeals and collegially in *amparo* cases. A majority of circuit court justices were selected from among the justices of the 68 district courts *(juzgados de distrito)*.

Each of the 31 states had a Supreme Court of Justice ranging in size from three to eight justices selected by the governors of their respective states and serving six-year terms. Local justices of the peace, popularly elected, served in every *municipio (local administrative unit)*. The decisions of state courts could be overridden by the federal courts.

Generally, the judiciary was more independent of the president than was the legislature. This was due largely, however, to its unwillingness to hear cases that it judged to be political and to the civil law tradition of applying the law as written without questioning its validity. Although cases had been decided against presidents (between 1917 and 1980 one-third of some 5,500 writs of *amparo* involving the president and his secretaries as defendants were decided in favor of the plaintiff), the judiciary seldom attempted to thwart the will of the president on major issues. For example, an *amparo* suit brought by former owners of banks that





Quarters of the federal legislature (above)
and the Supreme Court (below)
Photos by Arturo Salinas

had been nationalized by President José López Portillo y Pacheco was rejected by a district court though the constitutional amendment giving the president such power postdated the action.

Although there was no formal administrative court system, there were three special courts: tax, labor, and elections. The most active were the tax and labor courts.

State and Local Government

According to Article 40 of the Constitution of 1917, Mexico is a "representative, democratic, and federal republic formed by free and sovereign states in all matters which concern their internal government, but united in a stabilized federation." Article 124 limits the powers of the federal government to those specified in the Constitution, reserving all other powers to the states. Federal jurisdiction encompassed authority over commerce, banking, land use, public health, labor laws, corporations, and the licensing of professionals.

In 1984 each of the 31 states was headed by a governor popularly elected to a six-year term—reelection not permitted— and a Chamber of Deputies whose members were popularly elected to three-year terms—reelection permitted to nonsequential terms. The size of state chambers was based on population and varied from nine to 25 members. The regent of the Federal District, roughly equivalent to a state governor, was appointed by the president.

Although constitutionally autonomous, state governments were in practice subordinate to the president. Since 1924 all governors have been members of the PRI; the party, in turn, has long been controlled by the president. If a governor proved to be uncooperative, the president could request that the Senate declare that governmental authority had failed in the state, enabling him to appoint a new governor for the remainder of the term, or he could assign military zone commanders to oversee and report on the activities of governors (see National Security Concerns for Mexico, ch. 5). Finally, because the states turned over some 87 percent of tax revenue to the federal government, state governments were fiscally dependent on the president. Presidential dominance was limited only by the fact that the gubernatorial term coincided with the presidential *sexenio* in only six states. Thus, each president began his term with 25 governors who were holdovers from previous presidents.

State constitutions generally mirrored the federal Constitution, concentrating power in the governor; the unicameral legislature—the state Chamber of Deputies—exercised little influence on policy. Governors generally chose PRI nominees for municipal president and municipal councils in the 2,359 *municipios* in Mexico, both of which were subject to removal under powers similar to those the president had over governors. Local governments were not universally controlled by members of the PRI, although the number of *municipios* controlled by opposition parties has never exceeded 20. Municipal budgets had to be approved by the governor.

Institutional Revolutionary Party

The Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI), Mexico's "official" party, was the preeminent political organization of the country. In terms of power it was second in importance only to the president, who also served as the party's effective chief. Since its founding in 1929, the PRI has controlled the presidency, all state governorships, and all senatorial seats except for one during a single term. In the 1982 elections it polled 71.6 percent of the presidential vote and 69.1 percent of the vote for the Chamber of Deputies, electing 299 deputies. So completely had it dominated organized political activity throughout its history that in the late 1970s many observers commented that the populace was increasingly apathetic about organized politics. However, the 1982 elections showed a growing importance of opposition parties, and the PRI received the lowest percentage in a presidential election in its history (see Mexico under de la Madrid: The Politics of Austerity, this ch.).

In 1984, however, most analysts agreed that the party was not, in spite of its dominance in the political system, an autonomous institution. It was subordinate to the government, particularly to the president, and served more as an electoral machine designed to mobilize popular support for the activities of the government than as a vehicle for popular participation in policymaking. However, by bringing virtually all the organized interests of Mexican society, except for business groups, under its umbrella, the party had been able to ensure the social and political stability that characterized Mexico from the 1930s through the 1980s.

History

The party was founded by Plutarco Elías Calles in 1929 as the National Revolutionary Party (Partido Nacional Revolucionario—PNR), a loose confederation of local political bosses and military strongmen grouped together with labor unions, peasant organizations, and regional political parties. In its early years it served primarily as a means of organizing and containing the political competition among the leaders of the various revolutionary factions. Calles, operating through the party organization, was able to undermine much of the strength of peasant and labor organizations that affiliated with the party and to weaken the regional military commanders who had operated with great autonomy throughout the 1920s. By 1934 Calles was in control of Mexican politics and government, even after he left the presidency, largely through his manipulation of the PNR, thus enabling him to reestablish central political authority after the chaos of the Revolution (see The Constructive Phase, ch. 1).

Between 1934 and 1940 an intense struggle for political control developed between Calles and the new president, Lázaro Cárdenas. At the time, Calles represented the conservative elements of the Revolutionary coalition, while Cárdenas drew his support from the more radical political elements. To strengthen his hand against Calles, Cárdenas reunited the labor and peasant organizations that Calles had earlier fragmented and formed two national federations, the National Campesino Confederation (Confederación Nacional Campesina—CNC) and the Confederation of Mexican Workers (Confederación de Trabajadores Mexicanos—CTM). Using these organizations as the bases of his support, Cárdenas then reorganized the PNR in 1938, renaming it the Party of the Mexican Revolution (Partido de la Revolución Mexicana—PRM), incorporating the CTM and the CNC and giving it an organization by sectors: labor, agrarian, popular, and military. The creation of these groups and their integration into the party marked the legitimation of the existing interest group organizations and the transformation of the political system from an elite to a mass-based system. Within a year the PRM claimed some 4.3 million members: 2.5 million peasants, 1.3 million workers, and 500,000 in the popular sector. In 1946 President Manuel Ávila Camacho abolished the military sector, shifted its members into the popular sector, and renamed the party the PRI.

The Peace of the Institutional Revolutionary Party

Beginning with the Cárdenas administration, the PRI engineered an unprecedented political peace. The overt political intervention by the military that had characterized the country's politics throughout its history largely disappeared when Ávila Camacho, the last military president, left office in 1946 (see Background and Traditions of the Armed Forces, ch. 5). For nearly three

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A PRI convention in Puebla (above)
and party headquarters in Mexico City (below)
Photos by Arturo Salinas

subsequent decades there were few episodes of large-scale organized violence and no revolutionary movements that enjoyed widespread support, despite considerable strains between 1968 and 1975 and a difficult period of economic austerity beginning in 1982.

For the middle class, whose members typically had led rebellions in the past, the PRI provided upward mobility either through politics—the rule of no reelection opened frequent opportunities for public office—or through business during a period of economic growth (1940–82) unprecedented in developing countries. It also integrated workers and peasants into the political system by laying claim to being the only vehicle for the realization of their demands for labor union rights and land reform. The party operated much like an urban political machine in the United States. It weakened attempts to form horizontal class or interest-based political alliances within the lower class by dispensing services to individuals in exchange for their votes. The PRI emphasized personal relationships between individuals of the lower class and party and government officials. It distributed political patronage from the top down to members of organized labor, the agrarian movement, and the popular sector in accordance with their relative strength in a given area. Finally, it used electoral fraud, corruption, bribery, and repression when necessary to maintain control over individuals and groups.

The PRI was primarily a coalition of networks of aspiring politicians seeking not only positions of power and prestige but also the concomitant opportunity for personal enrichment. At the highest level of the political system the major vehicles for corruption were illegal landholdings and unethical manipulation of public sector enterprises. In the lower reaches of the party and governmental hierarchies the preferred methods were bribery, charging the public for legally free public services, charging members of unions for positions, nepotism, and outright theft of public money. This corruption, although condemned by North American and Mexican observers alike, served an important function in the political system. It strengthened the political peace by providing another means of upward mobility within the system and ensured that those who were forced to retire from politics by the principle of no reelection would have little financial incentive to try to upset the consensus on which the stability of the political system rested. During the 1970s and early 1980s, however, the scale of corruption, particularly during a period of economic crisis, produced unprecedented economic and political tensions in the system and prompted a reform movement (see Mexico under de la Madrid: The Politics of Austerity, this ch.).

Organization

In 1984 the dominant organizational aspect of the party remained its division into three sectors: agrarian, labor, and popular. This sectoral organization was used not only to group members but also to determine positions within the party hierarchy and the division of the party's seats in the Chamber of Deputies. The agrarian sector was made up primarily of the CNC, which encompassed all members of *ejidos* (see Glossary) throughout the country. In 1984 the CNC claimed more than 4 million members (see Peasant Groups, this ch.). The labor sector consisted of the CTM, the General Confederation of Workers (Confederación General de Trabajadores—CGT), the Regional Confederation of Mexican Workers (Confederación Regional de Obreros Mexicanos—CROM), the Revolutionary Confederation of Workers and Campesinos (Confederación Revolucionaria de Obreros y Campesinos—CROC), and independent unions (see Labor Groups, this ch.). The popular sector, by far the most influential in 1984, consisted primarily of the National Confederation of Popular Organizations (Confederación Nacional de Organizaciones Populares—CNOP).

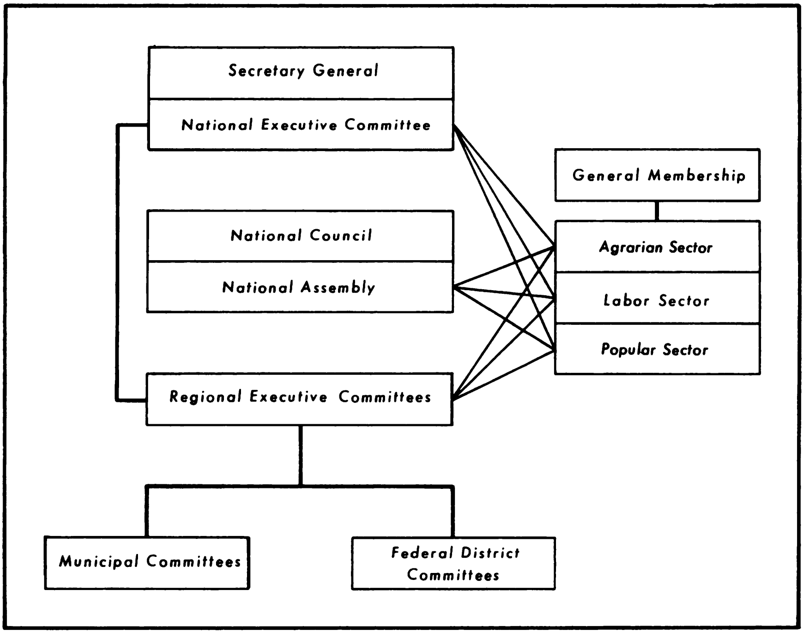
The CNOP had a heterogeneous membership compared with the other sectors. Under its umbrella were grouped organizations of the liberal professions, white-collar government employees, small businessmen, artisans, students, small farmers, social groups, teachers, and others. Although it was unlike the labor and agricultural sectors in that membership was open to individuals as well as to groups, the popular sector was nevertheless completely dominated by the CNOP. Within the CNOP the largest and most powerful organization was the Federation of Labor Unions of Workers in the Service of the State (Federación de Sindicatos de Trabajadores en el Servicio del Estado—FSTSE) whose president always served as the CNOP's secretary general.

Despite the fact that the CNOP did not have a legally prescribed relationship with the government (in contrast to both the CNC and the CTM, whose official ties were based on Articles 27 and 123, respectively, of the Constitution), popular sector members had the greatest access to the president and the greatest influence over policy formulation. CNOP members held most positions in the party, including offices in the other sectors and more seats in the Chamber of Deputies. They were much more likely to rise to higher office in the political system and received most of the economic benefits of government policy. Observers attributed the influence of the CNOP largely to the fact that membership within it was more a matter of choice than obligation, as in the other sectors. Consequently, its members were continually courted and cajoled into allegiance. This gave a premium to the political skills of its leadership and created pressures for efficiency and effectiveness that were missing from the other sectors.

The party apparatus was divided into four levels (see fig. 11). Although the president of the republic was the head of the party, the day-to-day operations of the party organization were the responsibility of the party's president and its secretary general. Nominally elected by the PRI's National Assembly, both of these officials were, in practice, selected by the president of the republic, as were secretaries of agrarian activities, labor activities, and popular activities (nominally chosen by their respective sectors) and two secretaries of political action (nominally chosen by the party's caucus in each chamber of the federal legislature), all of whom served on the party's National Executive Committee (Comité Ejecutivo Nacional—CEN). Below the CEN was the National Council, consisting of 15 representatives from each of the three sectors of the party plus the presidents of each of the 32 regional executive committees, one for each of the 31 states and the Federal District. The National Council was dominated by the CEN. Direction of the committees was officially the responsibility of the National Council. In practice, however, the committees reported directly to the CEN. Their organization mirrored that of the National Council; municipal committees (one for each *municipio)* and district committees (one for each election district in the Federal District) reported to them. The lowest national entity was the National Assembly, consisting of 1,500 delegates chosen in municipal and state assemblies to represent each sector equally. The National Assembly was convened by the CEN, normally every three to four years and every sixth year to ratify the presidential candidate of the party, who had usually already been announced by the CEN. In mid-1984 the party was discussing changes in these structures (see Mexico under de la Madrid: the Politics of Austerity, this ch.).

Business Groups

Despite considerable revolutionary rhetoric to the contrary, the country retained a firmly capitalist economy in 1984. Some North American observers, noting the constitutional reservation of ownership of subsoil resources to the state, the large number of parastatal firms (see Glossary), the formal integration of labor


Secretary General
National Executive Committee
General Membership
National Council
National Assembly
Agrarian Sector
Labor Sector
Popular Sector
Regional Executive Committees
Municipal Committees
Federal District Committees

Source: Based on information from Robert E. Scott, *Mexican Government in Transition*, Urbana, 1964, 158.

Figure 11. Institutional Revolutionary Party Organization, 1984

unions into the political system and de la Madrid's description of the government as "rector" of the economy, argued that the country was moving toward socialism. Most analysts, however, noted that state control traditionally has been used more to support than to compete with the private sector and that unions were, in fact, tightly controlled.

Since the 1940s successive presidents have pursued policies directed toward balanced economic growth, involving the participation of many forms of ownership—state as well as private. Consequently, an implicit bargain between the state and private businessmen evolved. The state would distribute part of the benefits from economic growth away from the private sector and in addition would maintain order, control labor, protect national business from foreign competition, limit state takeovers of private firms primarily to foreign subsidiaries, and ordinarily respect managerial autonomy. Businessmen in turn would not seek to overthrow the government and would accept governmental primacy in economic matters. As many analysts have noted, the bargain produced 20 years of unprecedented economic growth and labor peace. Beginning with the *sexenio* of Luis Echeverría Álvarez (1970–76), however, private business-government relations became more conflictual and heated disagreement ensued over the size of the state sector, land reform, and the nationalization of banking.

Generally, government-business relations were characterized by government initiative and business reaction. Business spokesmen seldom drafted or proposed legislation, although they frequently were asked to react to government drafts. Many business groups were officially represented on government agencies, commissions, and boards, and there were laws requiring consultation with business groups regarding policies affecting their sectors. In addition, individual businessmen participated directly in politics, in either the PRI or one of the opposition parties, although their political participation was much less frequent than was common in the United States. Although business groups did not have a power of veto over government decisions they found distasteful, the insistence by businessmen on a "climate of stability" generally found a sympathetic audience in the government.

The primary vehicles for representing business views were the many official and semiofficial business associations. In 1984 there were several hundred such associations, most based on voluntary membership. Membership in the official associations was mandatory, however, and refusal to join could be prosecuted under tax evasion laws.

The Confederation of National Chambers of Commerce (Confederación de Cámaras Nacionales de Comercio—CONCANACO) was founded in 1917 as an umbrella organization that grouped together 254 local chambers of commerce. In 1936 Cárdenas required all commercial firms with equity capital over a set minimum to join a chamber of commerce, thus making them members of CONCANACO. Although it was not affiliated with the PRI or any other party, CONCANACO was an official participant in government policy deliberations and traditionally supported free trade, reduced commercial restrictions, and a staunchly conservative labor policy.

The Confederation of Chambers of Industry (Confederación de Cámaras de Industria—CONCAMIN) was founded in 1918 to serve as the umbrella organization for industrial associations. CONCAMIN was organized by industry; membership was mandatory in one of its 51 national industrial chambers. CONCAMIN had no official link to any political party but was officially included in the setting of industrial policy. It traditionally supported import substitution industrialization protected by nationalistic technology policies, tariff barriers to imported goods, and government subsidies to promote exports. CONCAMIN was generally conciliatory toward labor in order to ensure peace on the assembly line.

The National Chamber of Manufacturing Industries (Cámara Nacional de la Industria de Transformación—CANACINTRA), officially one of the member associations of CONCAMIN, was founded in 1941 and represented some 60,000 member firms by 1983. Most member firms were those that benefited most from the policy of import substitution industrialization adopted by the government during the 1940s. It traditionally favored government policies to control foreign investment, but beginning in the late 1960s it included local subsidiaries of foreign firms within its membership. CANACINTRA operated independently of CONCAMIN on most issues, preferring more confrontational tactics with the government, whereas CONCAMIN preferred quiet lobbying to public opposition to government policy. CANACINTRA opposed government involvement in the distribution of basic commodities, increases in minimum wages, the devaluation of the peso, price controls, and Mexican membership in the General Agreement on Tariffs and Trade (GATT).

The Coordinating Council for the Private Sector (Consejo Coordinador Empresarial—CCE) acted in the name of the private sector as a whole. Established in 1975 on the initiative of business to oppose the economic policies of the Echeverría administration, the CCE joined together CONCANACO, CANACINTRA, CONCAMIN, the Mexican Bankers' Association, the Mexican Association of Insurance Institutions, the Employers' Confederation of the Republic of Mexico, and other groups. Through the CCE business attempted, for the first time since 1940, to formulate a common perspective on economic policy that was independent of the government and cut across the traditional lines of government-sponsored organizations. The CCE generally opposed increases in the minimum wages and the expansion of state activity in the economy.

There was some question, however, of how representative the CCE was of the business community as a whole. For example, the CCE described the September 1, 1982, nationalization of banking by López Portillo as "a definite coup against private business and a clear sign of the country's entry into socialism." However, an independent survey taken in October 1982 indicated that some 40 percent of the industrialists surveyed and 45 percent of the small businessmen surveyed supported the decision. Only 25 percent of businessmen surveyed rated the decision as bad or very bad.

Labor Groups

Organized labor has enjoyed a special place in Mexican politics through guarantees in the Constitution and the official relationship between the bulk of the labor movement and the PRI. Because union leaders have generally inflated membership figures to increase their political importance, estimates of the size of the labor movement varied widely. In the late 1970s accepted estimates placed the size of organized labor between 20 and 25 percent of the nonagricultural work force nationwide. Analysts suggested that there was little correlation between union membership and any particular political orientation and that union members generally showed only a slight difference of opinion with their nonunion counterparts.

Until the end of the "economic miracle" in the late 1970s, the labor scene was characterized by a mutually beneficial and cooperative relationship between the government and organized labor. Labor leaders served two masters: the government and their rank-and-file members. They served the government by keeping labor demands moderate and the rank and file loyal to the PRI. In return, the government gave labor leaders political power and wealth, part of which could in turn be redistributed or shared among their loyal followers. The rank-and-file also benefited in that the government guaranteed organized labor a privileged economic status relative to the majority of Mexicans. The economic austerity of the early 1980s, however, severely strained this relationship of mutual accommodation.

Most labor unions were integrated into the PRI through the Congress of Labor (Congreso de Trabajo—CT), which joined together the CTM, CROM, CROC, the CGT, the Revolutionary Confederation of Workers (Confederación Revolucionaria de Trabajadores—CRT), and some independent unions to constitute the party's labor sector. The major association of government workers, the FSTSE, although a member of the CT, was affiliated with the popular sector.

Mexican unions were generally noted for their tight oligarchic leadership and their political conservatism. The term *charro* (literally, cowboy) was used pejoratively to describe oligarchic union leaders who used their position to amass wealth and power at the expense of the rank and file. In the early 1980s such oligarchic leadership was under pressure from independent unions that were not affiliated with the PRI, leading them to adopt a more confrontational stance against management and government economic policy, as well as from the members of their own unions, who became increasingly restive as wage increases failed to keep up with inflation from 1978 through 1984. Independent unions, although still representing a small minority of union members in 1984, were potentially threatening to government control of the labor movement. Their organization by industry—particularly the most modern and technologically sophisticated industries, instead of by geographic location, as in the CTM—magnified their potential economic power, as well as their radicalism. They were much more likely to strike than were their CT counterparts.

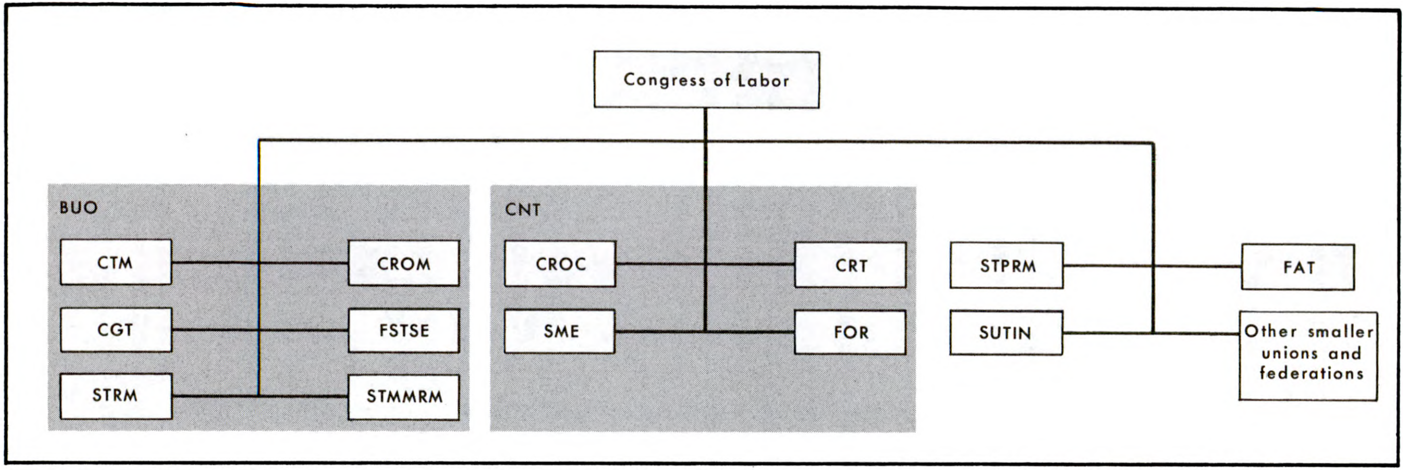
Labor-management relations were governed by the provisions of Article 124 of the Constitution, as defined by the 1931 Labor Code and amended in 1970. The code defined five employment categories—employers, confidential employees, minor supervisory and office workers, manual workers, permanent employees, and temporary workers—and outlined the rights of each. Thus, there was virtually no margin for disputes over employee rights or working conditions at the bargaining table. The code also detailed the rights of officially recognized unions to receive social security payments, profit sharing, housing, and meeting halls from employers. Unions received official recognition (and thus became protected by the provisions of the code) by applying to the Secretariat of Labor and Social Welfare. Strikes were legal and protected under the code if the secretariat was informed of the issues involved and authorized the action. All other strikes were illegal (typically, some 50 percent of strikes), and participating workers were required to return to work or face sanctions from the government and dismissal by their employers.

The code also provided for a system of labor courts to mediate disputes between labor and management. If mediation was unsuccesssful, either party could request nonbinding arbitration of the dispute. In this case, labor had an advantage because it could reject the outcome with no penalty. The contract was simply terminated. If management rejected the settlement, however, the contract was terminated, but management was required to grant severance pay to each worker at the rate of 20 days' pay for each year of service, plus an additional three months' wages. In general, wages were pegged to the official minimum wage, which varied by state. The official minimum wage for each state was set yearly by the National Tripartite Commission, made up of business, labor, and government representatives.

At the top of the labor movement was the CT (see fig. 12). It grouped together the CTM, CROC, CROM, the CRT, and the FSTSE, as well as the Union of Workers of the Nuclear Industry, the Union of Telephone Workers of the Mexican Republic (Sindicato de Telefonistas de la República Mexicana—STRM), the Mexican Union of Electricians (Sindicato Mexicano de Electricistas—SME), and some 25 other federations and unions. It was founded in 1966 following the failed attempt to unify the entire organized labor movement into a single federation called the Labor Unity Bloc (Bloque de Unidad Obrera—BUO). Despite the demise of the BUO, analysts in 1984 continued to classify the labor movement into groups that had been linked to the BUO (and had supported the attempt at unity), groups that had been linked to the National Workers' Central (and had opposed the move), and independent unions.

The BUO group was made up of the CTM, CROM, the CGT, the FSTSE, the STRM, and the Union of Mining and Metallurgical Workers of the Mexican Republic. In 1984 the CTM dominated both the CT and the labor sector of the PRI. In addition, its state and local federations were the major influence on the party's regional executive, municipal, and district committees. Led since the 1940s by Fidel Velásquez (84 years old in 1984), the CTM claimed to represent 4.5 million workers, 20 percent of the work force. Although the CTM had a profound influence in Mexican politics (some analysts suggested a controlling influence), its power was checked by other forces in the government. The two key demands for which the CTM had campaigned for over 30 years, the 40-hour workweek and indexation of wages, had still not been granted by mid-1984. At that time press reports indicated that the CTM was losing members to its rivals within the labor sector of the PRI (CROC and CROM), and that these federations were being favored by de la Madrid. Reports indicated that this was due to Velásquez' support for de la Madrid's rivals for the nomination of the PRI in 1982, his unprecedented public criticism of de la Madrid's economic program throughout 1982 and 1983, threats of a general strike by the CTM during those years, and de la Madrid's personal friendship with Cuautémoc Patela, who handled day-to-day operations for Antonio J. Hernández, CROM's 89-year-old leader. By mid-1983, however, Velásquez and de la Madrid appeared to have settled their differences.

CROM was founded in 1918 and had been the major labor federation before the founding of the CTM. In the dispute between Cárdenas and Calles in the 1930s, it sided with Calles and



BUO — Bloque de Unidad Obrera (Labor Unity Block)
CGT — Confederación General de Trabajadores (General Confederation of Workers)
CNT — Central Nacional de Trabajadores (National Workers' Central)
CROC — Confederación Revolucionaria de Obreros y Campesinos (Revolutionary Confederation of Workers and Campesinos)
CROM — Confederación Regional de Obreros Mexicanos (Regional Confederation of Mexican Workers)
CRT — Confederación Revolucionaria de Trabajadores (Revolutionary Confederation of Workers)
CTM — Confederación de Trabajadores Mexicanos (Confederation of Mexican Workers)
FAT — Frente Auténtico del Trabajo (Authentic Labor Front)
FOR — Federación de Obreros Revolucionarios (Federation of Revolutionary Workers)
FSTSE — Federación de Sindicatos de Trabajadores en el Servicio del Estado (Federation of Labor Unions of Workers in the Service of the State)
SME — Sindicato Mexicano de Electricistas (Mexican Union of Electricians)
STMMRM — Sindicato de Trabajadores Mineros y Metalúrgicos de la República Mexicana (Union of Mining and Metallurgical Workers of the Mexican Republic)
STPRM — Sindicato de Trabajadores Petroleros de la República Mexicana (Union of Oil Workers of the Mexican Republic)
STRM — Sindicato de Telefonistas de la República Mexicana (Union of Telephone Workers of the Mexican Republic)
SUTIN — Sindicato Único de Trabajadores de la Industria Nuclear (Union of Workers of the Nuclear Industry)

Figure 12. Official Labor Movement Organization, 1984

was thus eclipsed by Cárdenas' reorganization of the PNR and the foundation of the PRM. Officially part of the labor sector of the PRI, CROM voiced frequent support for the economic policies of de la Madrid. The CGT was founded in 1921 as an alternative to the House of the World's Workers, an anarcho-syndicalist organization linked to the International Workers of the World and the Trotskyite Fourth International. The CGT was affiliated with the Moscow-oriented Comintern during the 1920s but dropped its affiliation when it joined the PRI in 1935. Since that time it has firmly supported the government.

The FSTSE, which had more than 1 million members, constituted a central organization within the popular sector of the PRI. It served the dual function of generating the political support of civil servants for the government and acting as their bargaining agent. The STRM, which broke away from the CTM in 1938, was traditionally affiliated with the Fourth International and rejected appeals by the government to join the progovernment labor movement until the 1960s. After joining the BUO, however, it generally followed the lead of the CTM, although it continued to guard jealously its organizational independence. The STRM, although officially affiliated with the CTM, traditionally acted independently in most matters. Although attempts by dissidents within the STRM to bolt the CTM and set up an independent federation failed in 1979, its ties to the CTM remained tenuous in 1984.

The CNT group was made up of CROC, the CRT, the SME, and the Federation of Revolutionary Workers (Federación de Obreros Revolucionarios—FOR). CROC was formed in 1952 by dissident unions that supported the presidential candidacy of Vicente Lombardo Toledano of the Popular Socialist Party (Partido Popular Socialista—PPS). Since 1953 it has generally followed the lead of the CTM on labor issues. In 1984 it called for worker participation in the management of the firms acquired by the government as a result of the nationalization of banks. The CRT was a small federation of some 10,000 members that typically followed CROC's lead on most issues. The SME and the FOR were small federations, each representing fewer than 20,000, which resisted the leadership of the CTM while generally adopting positions similar to CROC.

The most powerful of the independent unions was the Union of Oil Workers of the Mexican Republic (Sindicato de Trabajadores Petroleros de la República Mexicana—STPRM), which represented workers of the state-owned Mexican Petroleum Company (Petróleos Mexicanos—PEMEX). Although a member of the CT, the STPRM operated independently of the other official unions. During the late 1970s and early 1980s the STPRM was noted for its corruption and was charged with bribing government officials, charging members fees for jobs, demanding bribes from PEMEX officials in return for labor peace, and illegal business activities. In 1984 de la Madrid appeared to be moving against the union leadership, indicting some of its officials and ordering investigations of all charges of improprieties.

The Authentic Labor Front, founded in 1966 as a challenge to the CTM, was active in the automobile industry. It appeared in 1984 to be gaining some support for its attacks against the leadership of the CTM and foreign-owned firms. The General Union of Workers and Peasants of Mexico was the labor arm of the PPS. It was not a registered trade union and therefore had no collective bargaining rights but was active in the early 1980s in trying to organize landless rural workers.

Peasant Groups

The massive participation of peasants in the Revolution and the enduring symbolic importance of their demands for land and participation convinced the political elites of the peasantry's significance and volatility. They were, therefore, tightly controlled. Analysts described them as the weakest of the three sectors of the PRI. All land was held under two mutually exclusive categories: smallholdings and *ejidos*. Despite the legal limit of 100 irrigated hectares or its equivalent, "smallholdings" of 10,000 hectares or more were known to exist in the early 1980s (see The Rural Society, ch. 2; Land Tenure, ch. 3). Smallholders were members of the CNOP and exercised considerable influence with the government because of the country's agricultural crisis.

Peasants living on *ejidos* were members of the CNC, the peasant sector of the PRI. Its 2 million members were organized into committees at the *ejidal*, regional, state, and national levels. Officials on these committees were chosen by election, but analysts agreed that officials were seldom themselves peasants and, in fact, were generally former members of the CNOP appointed to positions in the CNC by party leaders. The CNC depended on the regional executive committees of the PRI to finance its activities, just as the *ejidos* themselves depended on the Secretariat of Agrarian Reform for financial assistance and aid in gaining and keeping titles to the land they occupied. The main function of the CNC was to mobilize rural support for the PRI and to keep peace in the countryside. Rebellious peasants often found assistance from the government terminated, and the leaders of dissident peasant movements have often been arrested or killed (see Threats to Internal Security, ch. 5).

Other peasant organizations sprang up as a result of the government's control of the CNC, although they generally suffered government repression and were unable to mobilize large numbers of peasants. The Independent Peasant Central attempted to mobilize landless day laborers, but its split into pro-PRI and anti-PRI factions limited its effectiveness. The Coalition of Isthmus Workers, Campesinos, and Students (Coalición de Obreros, Campesinos e Estudiantes del Istmo—COCEI), in coalition with the Mexican Communist Party, succeeded in winning control of the *municipio* of Juchitán in Oaxaca in the February 1981 municipal elections but then lost to the PRI in 1983 in an election denounced as fraudulent by most opposition parties (see Opposition Parties, this ch.). The COCEI's refusal to vacate the town hall in protest resulted in storming of the building by the police, supported by troops, who arrested more than 300 of its members.

Student Groups

Mexican students, well aware of the inequalities of their society, were generally seen as alienated from the government, particularly during the late 1960s and early 1970s. The National Autonomous University of Mexico (Universidad Nacional Autónoma de México—UNAM) was perhaps the most important center of student resistance to the government, but the National Polytechnic Institute (Instituto Politécnico Nacional—IPN) was also active in opposition circles.

Student-government relations experienced their most serious crisis between 1968, when army troops killed an estimated 300 demonstrators in Mexico City in what became known as the Tlatelolco Massacre, and 1971, when scores of student demonstrators were shot down by a paramilitary group known as the Halcones (Hawks) in what became known as the Corpus Christi Day Massacre. As a result of these events, most student leaders went underground and were thought to be involved in several of the guerrilla movements that were active in the mid-1970s (see Threats to Internal Security, ch. 5). Since 1977 student opposition appeared to have been successfully channeled into the many new political parties that were created as a result of the political reform (see Opposition Parties, this ch.). In addition, students were active in attempts to democratize the official National Union of Education Workers and an unsuccessful attempt to gain recognition for the United National Union of University

Workers as the sole bargaining agent for university workers in 1980.

Opposition Parties

Political parties had first to seek legal registration from the Federal Electoral Commission, an agency of the Secretariat of Government, in order to run candidates in elections. Legal status could be obtained in one of two ways. A party could apply for conditional registration, allowing it to participate in elections, which became permanent if the party received at least 1.5 percent of the total votes cast nationally; failure to receive 1.5 percent resulted in the loss of legal status. Alternatively, a party could apply for permanent registration by presenting the Federal Elections Commission with an official copy of the party's statutes and principles and proof of at least 65,000 adherents (either 3,000 or more in at least one-half of the states or 300 or more in at least one-half of the 300 electoral districts). The first method was more commonly used. Fourteen new political parties and four organizations requested conditional registration in June 1984; few were expected to have any electoral significance. The PRI dominated the political spectrum and analysts divided the other parties into groups that fell either to the right or to the left of it or were allied with it.

The Right

The Party of National Action (Partido de Acción Nacional—PAN) was clearly the most important opposition party in Mexico in 1984. It was formed in 1939 by conservative intellectuals and professionals who opposed the Revolution's turn to the left under Cárdenas. Historically economically conservative and oriented toward the Roman Catholic church, PAN received the bulk of its financial backing from the business interests of the Monterrey and Guadalajara groups during the 1940s (see The Urban Society, ch. 2). Its electoral strength came from those dissatisfied with the PRI, particularly the middle class. However, these votes were interpreted as more of a protest against the PRI than as a positive vote for PAN. It ran a candidate for president in every election between 1946 and 1982, with the exception of 1976, when its leadership was unable to agree on a candidate. The disagreement, still not completely resolved in 1984, revolved around the role PAN sought to play in the political system. Throughout its first 20 years PAN offered itself as an ideologically based opposition to the Revolution. It favored a limited state role in the economy, lower taxes for small businessmen, the breakup of the *ejidos* into individually owned plots, and the repeal of anticlerical legislation. One faction within the party continued to emphasize these points in 1984. The other faction, which sought to play a role as an electoral alternative to the PRI while accepting most of the achievements of the Revolution, emphasized the democratic internal organization of the party, in contrast to the PRI, and sought to develop a coherent reform program.

PAN's 1982 presidential candidate and party leader in 1984, Pablo Emilio Madero, represented the faction opposed to the Revolution. In February 1984 he defined his party's aims as being "to transform Mexico from a state of savagery to civilization" and viewed the administration of President de la Madrid as representing the extreme left. Under Madero's leadership PAN increased its share of the vote to almost 17 percent in the 1982 presidential election and won 51 seats in the Chamber of Deputies. It won 12 mayoral elections in the states of Chihuahua and Durango in 1983—most significantly in their capital cities and in the border city of Ciudad Juárez—and was favored to win the governorship of Sonora in the scheduled 1985 election. In 1983, following widespread allegations of fraud by the PRI in municipal and state elections, PAN and the Mexican Democratic Party (Partido Demócrático Mexicano—PDM) formed Democratic Action of Electoral Rescue in order to present "a united front in defense of electoral honesty." PAN's electoral support came mostly from the middle class in the Federal District and broad sectors in the northern states. In addition, PAN appeared to have made limited inroads with the PRI's traditional followers among urban migrants.

The PDM was the political arm of the National Sinarquist Union (Unión Nacional Sinarquista—UNS). The UNS was formed in 1937 as a reaction to the reforms under Cárdenas. Analysts noted that the movement had inherited the psychology and some of the membership of the Cristero rebellion of the late 1920s (see The Constructive Phase, ch. 1). The term *sinarquista* is a union of two words, "without" *(sin)* and "anarchy" *(anarquía)*, or, stated positively, "with order." The key term is order—an order of Christian theocracy, first under God and then under a God-fearing state. All UNS members were ardent Roman Catholics who saw themselves as disciplined soldiers of a political-religious crusade. Historically, the UNS was linked to the ultraconservative Spanish Falange and Opus Dei and tended to blame Jews, Masons, communists, and foreigners for the country's problems. When UNS decided in 1977 to enter electoral politics, it formed the PDM (*sinarquismo* was considered a religious doctrine, making the use of the word in the name of a party constitutionally prohibited).

The PDM claimed that the primary mission of the state is to guarantee an atmosphere that will protect and honor human dignity and preserve the family as the basic unit of society. Its doctrine asked that church and state work together for material abundance for all and freedom of intellectual inquiry and religious belief but urged that the state not curtail the privileges of the Roman Catholic church. The PDM stressed the right to private property and opposed governmental encroachments into the realm of private enterprise. The party called for a profound educational reform in which distinct groups could participate and educational policy not be dictated by the state. In 1982 the PDM received 1.9 percent of the vote in the presidential election and 2.5 percent (12 deputies) in the elections for the Chamber of Deputies. It was particularly strong in San Luis Potosí, Guanajuato, Jalisco, and Querétaro, drawing its support from conservative Catholics in rural areas and small businessmen.

The Center

The center of the political spectrum consisted of the PRI and its electoral allies, the Popular Socialist Party, the Authentic Party of the Mexican Revolution (Partido Auténtico de la Revolución Mexicana—PARM), and the Socialist Workers' Party (Partido Socialista de los Trabajadores—PST).

The PPS was founded in 1949 by Vicente Lombardo Toledano in opposition to the PRI's turn to the right under President Miguel Alemán Valdés. It called for a return to the precepts of the Revolution and espoused the doctrine that the working class could make advances in the country if it forged an alliance with "the progressive sectors of the bourgeoisie." In every presidential election from 1958 to 1982 the PPS announced that the presidential candidate of the PRI represented the "progressive sectors" and thus gave the PRI's candidate its nomination as well. The party typically ran its own candidates for other offices. Its party leader in 1984, Jorge Cruickshank, served in the Senate from 1976 to 1982, the only non-PRI senator since the 1930s. Analysts generally suggested that the PPS received financial support from the PRI because it served to inhibit the formation of an independent left. The PPS was, however, in decline after the death of its founder in 1968. In 1979 a majority of its members left the party to join the PCM, and in 1982 it received only 2.2 percent of the vote for opposition party candidates for the Chamber of Deputies (10 deputies).

PARM was founded in 1954 by General Jacinto B. Treviño and other old-line Revolutionary generals who were dissatisfied with the abolition of the military sector of the PRI by President Ávila Camacho and the loss of "Revolutionary fervor" under President Adolfo Ruiz Cortines. Rumored to receive financial help from the PRI, PARM supported the positions of the PRI and endorsed the PRI's presidential candidates, although it did run candidates for other offices. Its major policy program called for increased aid for small farmers. PARM traditionally won 2 to 2.5 percent of the total vote for the Chamber of Deputies, the bulk of its support coming from middle-class men in Tamaulipas, Veracruz, and Jalisco. In 1982 it failed to receive the 1.5-percent minimum required for legal registration and thus did not win any deputies, but in June 1984 it reapplied for conditional registration.

The PST, although a Marxist party, was also rumored to receive support from the PRI, particularly from former president Echeverría, as an attempt to dilute the impact of the PCM. It was founded in 1973 by Rafael Aguilar Talamantes, who remained party leader in 1984. The PST called for government expropriation of all businesses and for each enterprise to be governed by a workers' committee. It stressed its independence from Moscow and Havana and its adherence to the electoral route to political power. It was noteworthy for its organizational efforts among Mayan, Náhuatl, Zapotec, and Tarascan Indians. In the 1982 Chamber of Deputies elections it won 2 percent of the vote (11 deputies), mostly from working-class areas in the Federal District.

The Left

In 1984 the legally registered parties to the left of the PRI and its allies were the Unified Socialist Party of Mexico (Partido Socialista Unificado de México—PSUM), the Revolutionary Workers' Party (Partido Revolucionario de los Trabajadores—PRT), and the Mexican Workers' Party (Partido Mexicano de los Trabajadores—PMT). The PSUM was formed in 1981, bringing together the Mexican Communist Party (Partido Comunista de México—PCM), the Party of the Mexican People (Partido del Pueblo Mexicano—PPM), the Revolutionary Socialist Party (Partido Socialista Revolucionario—PSR), the Movement of Socialist Action and Unity (Movimiento de Acción y Unidad Socialista—MAUS), and the Political Action Movement (Movimiento de Acción Política—MAP). From its founding in 1919 until its formal dissolution in 1981, the PCM was a Moscow-oriented Marxist party, although in the late 1970s it sought to deemphasize its Moscow connection by condemning the Soviet invasion of Afghanistan, supporting independent trade unions in Poland and projecting an image similar to the "Eurocommunists" of Spain and Italy. It called for the expropriation of private business, party control of the media, and the abolition of private schools. It emphasized the electoral route to political power, seeking to become a party of mass membership rather than a traditional Leninist party of a restricted membership acting as a revolutionary vanguard.

The PPM, PSR, and MAUS were much smaller parties that grew out of the student movement of the late 1960s. They registered as parties in 1977 and ran in the 1979 elections for the Chamber of Deputies in coalition with the PCM. This later became the basis for the PSUM. MAP, linked to independent Marxist unions in the electrical and nuclear industries, was formed in 1981, some months before joining in the formation of the PSUM.

In 1984 the PSUM appeared to be holding together, despite internal disagreements over personalities and ideology. Its 17 deputies were particularly active in the debates in the Chamber of Deputies, but the group had difficulty extending its constituency beyond radical sectors of the urban middle class and the universities. The PSR applied for conditional registration in June 1984 as a separate party, which, if granted, would require a formal break with the PSUM.

The PRT was a small party linked to the Trotskyite Fourth International. It called for taking control of both state and private firms through worker and peasant militancy. To that end it sought to create an independent movement of worker syndicates free from the influence of the PRI and the established unions. As of mid-1984 it had had little success. The PMT was formed in 1975 and was based primarily in the universities; the bulk of its leadership consisted of intellectuals. It was noteworthy for the specificity of its proposals, which called for the elevation of the Federal District to statehood with a popularly elected governor, the abolition of the Federal Judicial Police, the imposition of a graduated income tax, control of business by the municipal councils, and the publication of the names of all stockholders of private firms. In 1981 it was denied registration for failure to include necessary documentation of its independence of any foreign organization and of its loyalty to Mexico, but in 1984 it was granted full legal status and became the first party to be brought into the system since the reforms of the late 1970s. In debates in the Chamber of Deputies it was largely responsible for engendering a national debate on the oil policies of the López Portillo administration. Both the PRT and the PMT participated in the discussions that led to the formation of the PSUM but withdrew over disagreements with the PCM—in the case of the PRT concerning ideology and in the case of the PMT concerning the internal organization of the PSUM.

Authoritarian Politics and Political Competition

The Revolution and the President

The president has been the preeminent political presence in the country since the 1920s. It was around him that the entire political life of the country revolved. It was he who directed the state administration and the PRI; it was in his name that all acts of government took place; and it was to him that Mexicans looked for fulfillment of their aspirations. Not only did the office have wide legal authority to act without any appreciable institutional or legal limits, but it also served as the center of the informal structures of political power (see The Government, this ch.). The only inviolate limit to his power was the principle of no reelection. Many analysts have, therefore, described the political system as authoritarian, led by a succession of six-year dictators.

The president, of course, did not make all of the decisions. As the government's size and role in the economy expanded, increasingly greater portions of the government were removed from the president's effective day-to-day control, and state governors and heads of the many government economic entities operated with increasing autonomy. Policymaking was a process of bargaining among secretariats, political factions, the PRI, interest groups, and unions, all of whose interests had to be kept in balance and none of whom could be permanently ignored. The task of balancing the many competing demands and thus holding the political system together fell to the president; it was this that gave him his tremendous political power.

The underlying legitimacy for this power was the common tendency to view the president as the representation of the achievements of the Revolution. For many Mexicans the president was the chief Revolutionary in the Revolution that has produced a political peace unmatched in Latin America, a record of economic development that was, until the early 1980s, envied throughout the Third World, and a record of redistribution of wealth that dispensed concrete, material benefits to a large portion of the population. It was the Revolution that broke the power of the Roman Catholic church, tamed the army, created the middle class, redistributed the land, gave rights to labor, stood against North American imperialism and foreign investors, and produced a rising standard of living for many.

For the majority of Mexicans the Revolution was more a myth than a reality. Mexico was not ruled by workers and peasants but by members of the middle class elite. The land reform program gave land to thousands, yet many thousands still remained landless in 1984 and were denied any hope of receiving land, for the government claimed there was no more land to distribute, despite the existence of large tracts of legally and illegally held land. After 40 years of economic growth, only 50 percent of the labor force was regularly employed in 1980. Labor occupied a place of symbolic privilege in the political system, usually having the honor of announcing the PRI's nominee for president, but it was businessmen who consulted with the government on economic policy.

Many analysts agreed that the key to understanding the conflicts within Mexican society was that the political tensions among the various constituencies of the Revolution were managed through an informal system of bargaining among members of the elite based on mutual accommodation. Membership in the elite was based on the possession of resources, sometimes political (as in the control of large numbers of followers) and sometimes economic (as in the control of investment capital or the labor force), and included not only the middle class, business interests, and the unions but also the peasantry, the urban slum dwellers, and the landless agricultural labor force. The heterogeneity of this elite largely accounted for what analysts have described as the policy incoherence of the government and the shifting of emphasis from reform during one *sexenio* to consolidation and conservatism in the next.

Each member of the elite sat atop a hierarchy of patron-client networks (called *camarillas)* that linked individuals together within and across the institutional structures of the country (see Interpersonal Relations, ch. 2). As the patron rose through the system, so too did his clients, all of them gaining access to progressively greater political and economic rewards. The competition among members of the elite, however, was limited by their common interest in the preservation of the system. The large-scale violence and economic destruction that accompanied the Revolution into the 1930s was still a vivid memory for many Mexicans in 1984. It hovered over the political system, producing wild rumors of coups and crises during the transitions from one *sexenio* to the next but also serving to keep the political competition within clearly defined and acceptable limits.

The Rules of Political Competition

Analysts suggested that the debate among the elites for political and economic benefits was regulated by their adherence to a set of accepted formal and informal rules of political competition. These rules helped prevent the escalation of the debate into open warfare that would threaten the stability of the system.

No Reelection

The constitutional provision prohibiting the reelection of the majority of elected officials was cited by most analysts in 1984 as the primary rule that regulated political competition and stabilized the political system. The principle of no immediate reelection of the president had a long tradition, having been included in the constitution of 1824. It was not in the constitution of 1857 as originally written but was included in an amendment in 1878 that prohibited immediate reelection yet permitted reelection after an interval of one term. This was changed in 1887 to permit immediate reelection but required an interval of four years before election to a third term. The constitution of 1857 was amended yet again, returning to the original formulation allowing reelection. After 34 years of rule by President Porfirio Díaz, the Revolution was sparked by Francisco I. Madero's Plan of San Luis Potosí, demanding "Effective suffrage—No reelection" (see The Military Phase, ch. 1).

The principle of no reelection as defined in the Constitution of 1917 prohibits any reelection of presidents or elected governors; appointed governors can be reelected after an interval of one term. Federal senators and deputies can be reelected after sitting out one term, as can state deputies, municipal presidents, municipal councilmen, and all elected municipal officials. The rule of no reelection does not apply to alternates as long as they have not assumed office.

This continuous rotation of the political elite has prevented the formation of permanent power bases that could threaten the preeminent position of the president and has ensured that the political system remained open to aspiring politicians seeking upward mobility. It has also strengthened the adherence of political elites to the system by holding out the possibility that even if they did not do well in one *sexenio,* they could wait for the next wave of elections and appointments in the hope of doing better. National political elites were said to undergo 90-percent renewal every three *sexenios*.

Sexenio

The rule of no reelection produced what was often referred to as a "sexennial rhythm" in Mexican politics. There were two aspects of this—one that operated across *sexenios* and the other within each *sexenio*. The massive turnover of personnel that marked each change of presidents produced a sense of great change, or "rebirth," of the political system every six years. It presented the opportunity for renegotiating the bargain that balanced the competing interests of various groups and political factions within the elite, for taking new directions in policy, and for taking stock of the state of the country since the last changeover. This renegotiation of the political pact produced what some analysts referred to as a "pendulum effect" to the sexennial rhythm, referring to the tendency for successive presidents to swing from reform to consolidation and back to reform as they tried to compensate those who lost during one *sexenio* with the policies of the next. Such balancing required that each new president ease tensions created by his predecessor while designing his own policy.

There was a rhythm within each *sexenio* as well. Typically, each president spent his first two years assembling his bases of support among the many constituencies of the Revolution, selecting and appointing the many thousands of members of his administrative team, and designing his policy program and then launching it. The middle two years were spent accelerating the implementation of his program and making any necessary adjustments. During the first two and last two years of the *sexenio*, the anticipated shake-up of the political elite broadened the president's freedom, and thus most new departures in policy occurred during those years. The final two years were spent managing the succession. Analysts noted that the incumbent president began to lose power from the moment the PRI announced his successor, normally 10 to 12 months from the end of his term, as elites scrambled to work out an accommodation with the incoming president. But it was also at this time that many presidents made unpopular decisions that would have been inevitable in any case, to relieve their successors of the onus of taking them. Examples of this practice were President Echeverría's devaluation of the peso in 1976 and President López Portillo's devaluation in 1982.

Corruption

Corruption was crucial to the functioning of the system at all levels, particularly during the oil boom of the late 1970s. There were two kinds of corruption noted: *la mordida* (literally, the bite), a bribe that Mexicans typically paid to low-level officials that was generally considered a kind of "user fee," and large-scale corruption, such as kickbacks from contracts, "insider" financial deals, and the like. Analysts reported that at the higher levels of government, individuals expected to leave office with cash and other possessions worth the equivalent of anywhere from a few hundred thousand to several million United States dollars, depending on the position and the person. For example, López Portillo was reported to have received a house valued at US$2 million as a gift from STPRM, the oil workers' union. STPRM reportedly had received the money as "commissions" it charged construction contractors doing business with PEMEX.

The high incidence of corruption was seen by some observers as essential to the maintenance of political stability. The opportunity to acquire riches while in office was seen to help ensure that individuals would have little financial incentive to try to upset the rule of no reelection. It also helped limit demands for radical policy change, for as aspiring politicians worked their way up through the system, they became co-opted and less likely to "rock the boat." If everyone benefited, or would benefit, it was obviously in everyone's best interest to ensure the stability and longevity of the system. The only exceptions to this rule were the most ideologically committed reformers and those who stood no real chance of benefiting. The former appeared to be few in number; the latter, most notably the peasants, were easily identified and carefully controlled. Noted Mexicanists Susan Kaufman Purcell and John F.H. Purcell reported that corruption was especially prevalent in what was called the "Year of Hidalgo," the final year of each *sexenio* (stemming from a poem that read: "This is the Year of Hidalgo; he is a fool who doesn't steal something"—it is José Hidalgo y Costilla's picture that appears on Mexican currency), during which the appropriation of public money reached monumental proportions.

During the López Portillo *sexenio*, corruption was reported to have reached such proportions that it contributed to the severe financial imbalances that led to the economic crisis in 1982. Press reports indicated widespread revulsion among the middle class with a system that required them to sacrifice during a period of economic austerity while politicians enriched themselves openly and lavishly with public money. Consequently, de la Madrid made "moral renovation" a central theme of his election campaign and moved to limit corruption after taking office (see Mexico under de la Madrid: The

Politics of Austerity, this ch.). This campaign, although politically and economically necessary, threatened one of the fundamental tenets of the political consensus in the country and therefore carried with it the possibility of future political instability if the campaign were not carefully managed.

Negotiation and Incorporation

Conflict within the elite was managed through a system of negotiation and mutual accommodation. The process of negotiation, which incorporated all the organized interests in the society into decisionmaking, was a major ingredient of the system's stability. Demands on the system were kept within acceptable limits by ensuring that each interest accommodated itself to the other interests in the system. Any particular interest seldom received all that it asked for, but the possibility that some new, more favorable arrangement would be made during the next *sexenio* helped ensure that each group would accept policy decisions and thus maintain the stability of the system.

The incorporation of new groups into the system depended on their acceptance of this process, particularly by their leadership. Aspiring elites who refused to limit their demands (the ultimate sign of rejection of the political consensus upon which stability depended) often found themselves subject to sanctions ranging from arrest and exile to death, and the interests they represented were either ignored or provided with new leadership. Independent unions, independent peasant organizations, student groups, and opposition political parties all have suffered violent suppression at the hands of government agencies at one time or another, including arrests, disappearances and, in a few celebrated cases, large-scale slaughter. Political mobilization was thus controlled and kept manageable. These sanctions were applied not only to dissident peasant and union leaders but also to presidents, as when Echeverría found himself in effect exiled as ambassador to India by his successor.

Through the mechanism of co-optation a wide variety of competing interests were incorporated into the system and given a stake in its continuance. Analysts attributed the relative peace in the country since the 1930s to this process.

Political stability was also strengthened by the relationship between the government and the mass media, which served to keep the political debate within acceptable limits. Mexico City was served by 18 daily newspapers as well as a number of weekly newsmagazines. The newspapers with the largest circulation in

1983 were the conservative *El Heraldo de Mexico* (209,600), the independent *Excélsior* (175,000), and *La Prensa*, a tabloid (297,803). The most prestigious newspapers were *Excélsior* and, on the left, *Uno Más Uno*. The government published *El Nacional*, but it had a small circulation in 1983. The government also owned the two largest chains of provincial newspapers. In the 1970s weekly magazines became important news sources. The three most widely read were *Proceso*, left of center; *Siempre*, generally middle of the road; and *Impacto*, on the right.

Although cases of outright censorship were rare, the government greatly influenced the content of news: First, most newspaper stories were, in fact, announcements from government agencies printed without comment as news. Second, most reporters received regular payments from the agencies they covered, as well as bribes from politicians seeking favorable press coverage. These payments came out of the advertising budgets of the agencies. Reportedly, this practice was stopped by de la Madrid as part of his "moral renovation" campaign (see Mexico under de la Madrid: The Politics of Austerity, this ch.). Third, the newspapers themselves, although privately owned and nominally independent, generally depended on government advertising for 20 to 30 percent of their advertising revenue. Finally, the government held a monopoly on the production and importation of newsprint. By manipulating advertising revenue and the price and availability of newsprint, the government ensured generally favorable press coverage. When these methods failed, the government resorted to more direct methods, such as fomenting labor trouble in newspapers through the official labor movement, as in the case of *Excélsior* in 1976, or a complete advertising boycott, as in the case of *Proceso* in 1982.

The broadcast media were also greatly influenced by the government. Radio and television station broadcasting licenses were issued by the Secretariat of Communications and Transport. The General Directorate of Radio, Television, and Motion Pictures, a bureau of the Secretariat of Government, regulated program content and authorized production of programs for broadcast over the state-owned television network as well as the four commercial networks owned by Televisa, a holding company in which the state held minority stock. Federal tax law required that radio and television stations provide 12.5 percent of their daily hours of transmission for public service announcements from the government, although the government seldom asked for its full allotment of time.

Generally, although the media occasionally engaged in critical

EL PANTEON PRIVADO DE DURAZO Y SAHAGUN BACA ES PEOR QUE LO DE TULA!

A wide variety of newspapers and magazines are sold at kiosks and by vendors throughout Mexico City
Photos by Arturo Salinas

reporting, the overwhelming tone of print and broadcast journalism was progovernment; the activities of opposition groups were reported, but the emphasis was on the "accomplishments of the Revolution." According to an independent survey taken in Mexico City in October 1982, nearly 66 percent of those surveyed relied on television as their primary source of news, 15 percent relied on newspapers, 6 percent on radio, and 13 percent on "friends."

Elections

Although elections were not held for the purpose of selecting the president or most other national officers, it was commonly noted that they served several other purposes. First, elections were crucial to the country's image as a democracy and established historical continuity with Madero's Plan of San Luis Potosí and the origins of the Revolution. Second, elections enabled elites to take periodic soundings of opinion in the country to determine areas of strength and weakness. Third, elections provided an opportunity to mobilize the country in support of the system, giving each citizen the opportunity to participate by declaring his or her support.

Finally, the electoral campaign process enabled each successive president to become known in the country and to familiarize himself with all areas and concerns of the citizenry. Presidential elections were preceded by a grueling 10-month campaign by the PRI's nominee (during which he formed alliances with state and local officials and most citizens were given at least the opportunity to present petititons to the candidate. During the 1982 campaign de la Madrid traveled nearly 100,000 kilometers and attended some 2,000 meetings in every state. Through the presentation of petititions, a sense of dependence on the president was engendered in the population.

Voting was mandatory for all citizens over 18 years of age; nevertheless, voter abstention sharply increased during the 1970s. Voter apathy was considered a serious problem by government officials and led them to institute the 1977 electoral reform that increased the role of opposition parties. In the 1982 elections 74.9 percent of registered voters participated, the highest officially recorded turnout since 1946. Elections were by direct secret ballot for individual candidates, except in the case of minority party seats in the Chamber of Deputies, which were elected by proportional representation based on the percentage of the minority party vote obtained by each party. All registered parties were entitled to free radio and television time during the campaign, as well as financial support by the government, which amounted to some 500 million pesos (for value of the peso—see Glossary) to defray campaign expenses for the opposition parties participating in the 1982 elections. PAN declined financial assistance from the government, and the amount given to the PRI was unknown. The Federal Electoral Commission was responsible for conducting the elections and ensuring their fairness. Outside observers reported that the commission had a history of favoring the PRI.

Although there did not appear to be any nationwide rigging of elections, irregularities were common in some localities. The norm appeared to be that the PRI permitted relatively minor victories for opposition parties but would not permit an election result that would seriously damage the party's hegemony.

Although analysts agreed that the presidential nominee of the PRI was not selected according to the formal procedures outlined in the party's statutes, they disagreed about the exact process by which he was chosen. Some North Americans suggested that the decision was made by consultations within the elite, including labor leaders, party leaders, businessmen, the military, and former presidents. Most Mexicans tended to discount this, arguing that the president selected his successor without consultation, trusting his own judgment of the country's political situation and selecting the man he felt most appropriate for building consensus. By either process, competition for the nomination was intense, although formal declarations of candidacy before the nominee was selected were extremely rare. When the president had made his selection, it was a common practice for one of the constituent sectors of the PRI to place his name formally in nomination. Once the official candidate was announced, political differences were buried, and the former competitors raced to jump on the political bandwagon of the victorious candidate.

Mexico under de la Madrid: The Politics of Austerity

The election of de la Madrid marked the continuation of a long-term political trend that began with Alemán (1946–52) away from administrations consisting of former Revolutionary officers and state political leaders to those made up of individuals whose careers had focused on the federal bureaucracy, the PRI, and national elective office. This change took place because the government sought individuals with technical educations to staff its expanding social and economic programs. Beginning with the Echeverría administration (1970–76), most cabinet members were men who did not have active careers in the PRI; moreover, neither López Portillo nor de la Madrid had held any elective or party post prior to the presidency, and both recruited officials outside the PRI.

These trends, and particularly de la Madrid's sidestepping of the PRI leadership in naming his cabinet and officials, severely weakened the party as the primary conduit for political recruitment and had the effect of weakening those political elements within it that had been struggling to democratize its internal structure. This left the party largely in the hands of a traditional leadership lacking technical education but with substantial political experience. In 1984 there were three major political factions within the party. The first, consisting of traditional party leaders (known as *políticos*),whose main concern was to strengthen the party through a return to the traditional style of populist politics, was loosely grouped around Fidel Velásquez, the head of the CTM. The second faction was made up of members of the new educated bureaucratic elite (known as *técnicos*),who favored a "nationalist" development policy that eschewed the alleged benefits of tighter integration with the world market and advocated tight controls on foreign investment, and a greatly expanded state economic role. It was associated with Carlos Tello, former head of the Bank of Mexico under López Portillo and widely rumored to have been the architect of the bank nationalization and exchange controls instituted in 1982. The third group consisted of *técnicos* who were more market oriented, favoring a so-called neoliberal economic policy based on closer economic integration with the world economy, reduced protection for domestic industry, and a reduced state role in directly productive activities. It was associated with Jesús Silva Herzog, secretary of finance under López Portillo and de la Madrid, and Miguel Mancera, Tello's predecessor at the Bank of Mexico, who returned to that post under de la Madrid. The Silva Herzog faction was in control of economic policymaking in 1984, while the Tello faction was based in the PRI's think tank, the Institute of Political, Economic, and Social Studies.

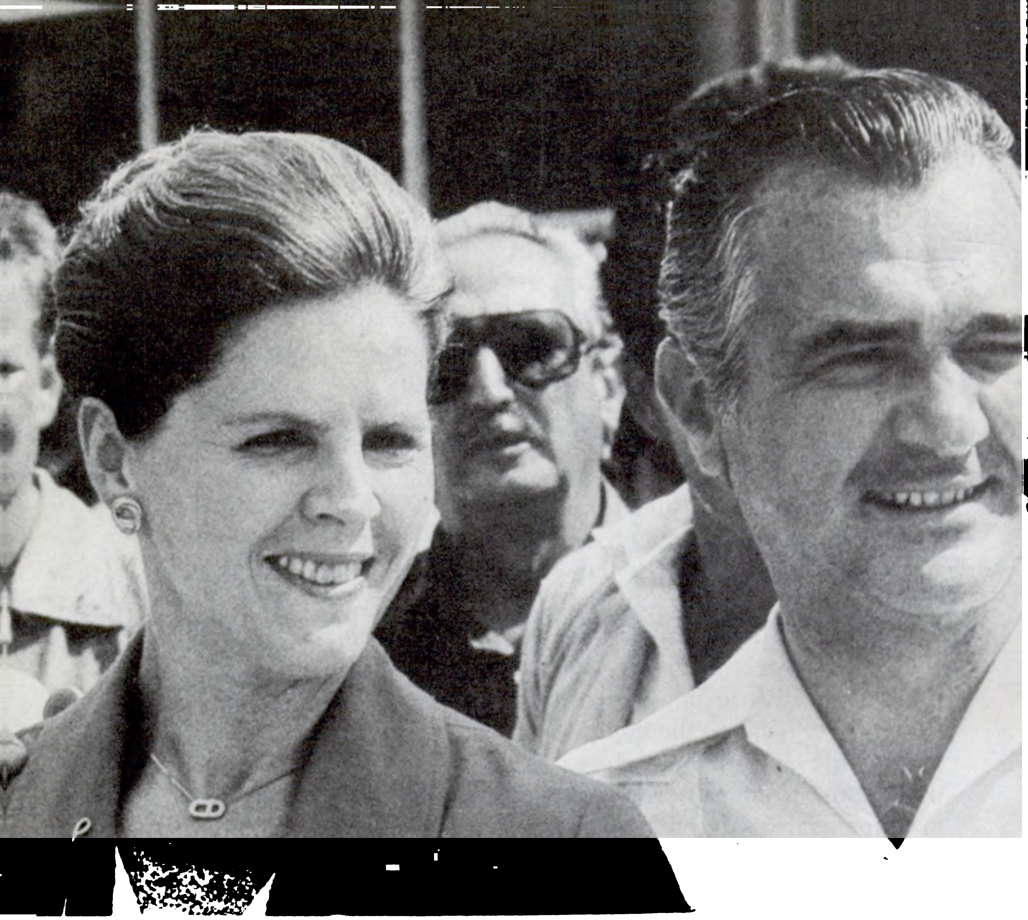
The shift to a more technocratic style of leadership and the sharply reduced role of the party in delivering patronage inhibited its ability to channel the conflicting demands of the many groups in the society as effectively as it had in the past. This was particularly true of the middle class, whose members came to question the ability of the party to provide concrete benefits, given its oligarchic organization and corruption. Although the increased voter turnout in the 1982 elections indicated that the PRI still had the capacity to get out the vote, its receipt of only 49 percent in the Federal District and the resurgence of PAN indicated widespread discontent within the middle class, a majority of whom resided there.

The country's financial collapse in 1982 and the subsequent economic austerity measures required by international lending institutions severely reduced the government's room for maneuvering in confronting these problems. Because of an inflation rate of about 100 percent, a 300-percent devaluation of the peso in 1982, and billions of pesos leaving the country, the government could not follow its traditional method of spending itself back into popularity. Severe cuts in government spending produced a deep recession in which, according to private sector estimates, more than 1.2 million people lost their jobs in 1982 alone. Organized labor responded predictably, the rank and file pressuring their leaders to confront employers and the government on wages and job security and some limited bolting to independent unions when their leaders did not respond and wage increases fell far short of inflation. Rural unrest also increased as the government declared an end to land reform in an effort to restore business confidence. Disturbances broke out in Tabasco and Chiapas and had to be put down with troops.

The political crisis deepened as PAN criticized corruption within the government and the PRI, the bank nationalization, and the undemocratic nature of the PRI, winning it the votes of a significant portion of the middle class. The PSUM also made inroads in PRI strongholds by stepping up efforts to persuade unions to bolt the CTM and by calling for a return to agrarian reform and increased aid to agriculture. This forced Velásquez into a more confrontational stance against government policy, and some unions—SUTIN in particular—called for the PRI to form an alliance with the PSUM.

De la Madrid, himself a *técnico* of the neoliberal school and therefore suspect in the eyes of the *políticos* and "nationalist" *técnicos* of the PRI, responded with a series of measures that appeared designed to balance the competing interests and to emphasize the state's role as ultimate arbiter of disputes. Two goals appeared paramount: to confront the economic crisis and put the country on a firm financial footing and to woo back the middle class through political liberalization and an attack on corruption. In mid-1984 it was still too early to determine the results of these initiatives.

In his inaugural address de la Madrid emphasized the gravity of the economic situation and outlined a program that called for reducing the growth of government spending, in part through improving budgetary controls; protecting employment and domestic industry; continuing public works projects in progress; encouraging programs for production, pricing, and distribution of basic foods; increasing government revenues through tax reforms and price increases for public sector services; channeling credit more effectively; rationalizing the foreign exchange markets; streamlining public administration; and guarding the government's role as "rector" of the economy. The program was enacted in a series of laws passed in December 1982. Most of the measures were designed to cut the public sector deficit in half during 1983, as the country had agreed in negotiations with the International Monetary Fund (IMF—see Glossary) during the last months of the López Portillo administration. Some suggested that de la Madrid had, in fact, been running economic policy throughout the period of his election campaign. If so, he was also responsible for 100-percent price increases for tortillas and bread, 60 percent for gasoline, and 30 percent for natural gas and electricity in August 1982, as well as a 100-percent increase in the price of gasoline



Courtesy Embassy of Mexico, Washington

President and Señora Miguel de la Madrid (above); the National Palace, the president's official workplace (top right); and Los Pinos, his official residence (below)

CALLE PEATONAL

Photos by Arturo Salinas

decreed the day he took office. The effect of these measures was to increase bankruptcies and to catapult the combined unemployment and underemployment rate to an estimated 50 percent of the work force.

Exchange controls were ended, causing a major devaluation of the peso and severely limiting the ability of the private sector to pay off its huge United States dollar debt. Price controls were removed from over one-half of the 5,000 items that had previously been controlled. These measures, combined with the reduction in public sector spending, reduced inflation to just over 80 percent in 1983. A major employment program, however, was unsuccessful in reducing the rate of unemployment and underemployment.

Most of these measures were required under the agreement negotiated with the IMF in November 1982 that brought Mexico an additional US$3.8 billion in credits, disbursed over three years, enabling it to avoid defaulting on payments of its estimated US$80 billion debt for 1983. In addition, however, in a departure from Revolutionary tradition, the government took measures to attract further foreign investment, most notably by relaxing the legal requirement of 51-percent Mexican ownership of all firms.

In another move to restore business confidence, the government responded to demands by CANACINTRA and in March 1983 began selling back to the private sector 339 of the 480 private sector firms acquired in September 1982 as a result of the bank nationalization. The bank nationalization itself, although known to have been opposed by de la Madrid, was not reversed as of mid-1984. Instead, the government took the opportunity to restructure the country's credit markets and to streamline the banking system. Thirty-four percent of the shares in the banks were sold to the private sector with the proviso that no more than 1 percent of the total could be owned by a single individual. The sale of the shares in the private sector firms was a defeat for the CTM and the "nationalist" *técnicos*, who had wanted them turned over to the unions. In June 1984 the government began selling its shares in the remaining 141 firms. Some suggested that further sales of shares in some of the 376 other firms in which the government had long been a partner might be in the offing, arguing that the government was attempting to reduce greatly the state's directly productive role in the economy, while preserving its ability to set the general direction of economic activity.

On the labor front a series of difficult negotiations over the official minimum wage strained the normally cordial relationship between the official labor movement and the government. From October to December 1982 a series of maneuvers by the CTM suggested that Velásquez, stung by criticism from his own union, was trying to solidify his position among the rank and file and demonstrate to the government the potential power of organized labor to disrupt the economy, while also reassuring the government of its ultimate loyalty. In October 1982 the CTM demanded a 50-percent increase in the minimum wage, then called for strikes by its member unions in support of that demand. The following year the CTM opened its assault with a demand for a further 50-percent increase to compensate for six months of inflation, then running at 99 percent annually. The CTM again threatened a wave of strikes in support of its demand but reversed itself, allowing individual unions to bargain with their employers while warning them not to accept less than a 25-percent wage increase. Bargaining broke down, and widespread strike actions began in June 1983 involving an estimated 150,000 to 200,000 workers. The unions, convinced of the futility of continued intransigence as strikes brought few results, settled ultimately for a 15.7-percent increase in the minimum wage and increases of 15 to 25 percent in a majority of settlements with individual employers.

After Velásquez was publicly embarrassed and weakened still further, de la Madrid seized the opportunity to denounce him as a "demagogue." Press reports indicated the president's preference for other labor organizations, such as the CROC, suggesting a move to reduce the influence of Velásquez and the CTM within the CT. The CTM sharply curtailed its rhetoric, and Velásquez and de la Madrid reached an accommodation. In the December 1983 negotiations it accepted an increase of 30 percent in the minimum wage, a figure even lower than the private sector had proposed. The next semiannual increase, in June 1984, amounted to only 20 percent.

Analysts suggested that this complex series of moves involved an attempt by de la Madrid to reassert the notion of a state interest or "public interest" independent of the official labor movement, as well as an attempt to weaken Velásquez, a stalwart of the PRI's *político* faction. Velásquez attempted to protect his position by threatening to expel CROC from the CT.

In a move widely interpreted as an attempt to regain credibility for the PRI among middle-class voters, de la Madrid made "moral renovation" his major campaign theme and moved against official corruption upon taking office. A new cabinet position, comptroller general, was created and empowered to monitor the expenditures of government offices in order to detect any embezzlement of funds; new legislation required officials to disclose their real estate holdings, bank deposits, and other sources of income. Further, the tradition of immunity from prosecution for governors, magistrates, deputies, and other officials for acts committed while in office was ended, and strict rules prohibiting the use of public funds, services, or property for private purposes were issued. A law against "inexplicable enrichment" was amended to permit easier prosecution of officials; nepotism, a long-standing practice central to the *camarilla* system, was nevertheless outlawed. In related legislation the anonymity of shareholders in private corporations was abolished, making it easier to determine the financial interests of public officials.

Given the political risks involved in prosecuting high government officials from previous administrations, de la Madrid moved cautiously, appearing to prefer prosecutions based on citizen denunciations rather than a government-orchestrated campaign. Thus, most prosecutions involved mid-level officials under López Portillo; some 89 officials were convicted of fraud, and the equivalent of US$83 million in cash and property was recovered during the first 17 months of the *sexenio*. In a few celebrated cases, however, charges were leveled against former members of the cabinet and other high officials. Former Mexico City police chief Arturo Durazo Moreno, who built a Parthenon-style mansion overlooking the capital, was indicted for inexplicable enrichment. He remained a fugitive until July 1984, when he was arrested in San Juan, Puerto Rico, by agents of the United States Federal Bureau of Investigation. Jorge Díaz Serrano, former head of PEMEX and a rival of de la Madrid for the 1982 presidential nomination of the PRI, was stripped of his senatorial immunity and arrested for fraud in several cases involving PEMEX's dealings with private contractors under his tenure. Two of his close subordinates were also convicted of receiving bribes from Texas-based equipment suppliers. The government moved against the STPRM, which had a reputation for being particularly corrupt, but by mid-1984 it appeared that the government's main objective was to ensure tighter controls over the union's finances rather than to overthrow the union leadership (see Labor Groups, this ch.). Finally, in a widely popular move, the government disbanded the Mexico City Division of Investigations for the Prevention of Delinquency, which had reportedly terrorized much of the population through extortion, assaults, and kidnappings, and appointed an army general, Ramón Mota Sánchez, as the capital's police chief, giving him orders to eliminate corruption from the police forces (see Police and Law Enforcement Organizations, ch. 5).

In mid-1984 it appeared that the prosecutions would be limited to these few celebrated cases and mid-level officials. Despite accusations that former president López Portillo had himself amassed a huge fortune while in office, it appeared that he would not be prosecuted. Surveys taken in Mexico City and Monterrey indicated that the anticorruption drive was widely supported, and 89 percent of those surveyed were in favor of jail sentences for those found guilty; 66 percent also believed legal action should be taken against López Portillo. Because the decision to excuse the former president seemed to be immutable, many questioned the ability of the anticorruption drive to improve the PRI's image among the critical middle class.

The limited political liberalization begun by López Portillo in 1977 was continued by de la Madrid. There were three aspects to de la Madrid's liberalization. The first was an attempt to decentralize political control and give greater autonomy to local governments. This was reportedly to be accomplished through a new technique called popular consultation *(consulta popular)* within the National System of Democratic Planning. The system, involving public forums held throughout the country, began operating in mid-1983. Observers commented that it was designed to create a new vehicle for the communication of citizen demands to governmental elites that bypassed the administrative and PRI structures. Reports indicated, however, that the hearings were being manipulated by the PRI faithful in most areas of the country and were therefore limited in effectiveness. Polls taken in Mexico City and Monterrey in early 1984 indicated that 52 percent of those polled thought the president was earnestly trying to carry out this goal but was not succeeding.

The second aspect of de la Madrid's liberalization was an attempt to institute electoral honesty in normally fraudulent local elections. Reportedly, it was hoped that this would provide an electoral outlet for discontent over economic austerity and also invigorate the PRI by forcing it to reestablish close ties with the citizenry at the local level. In December 1982, however, opposition candidates won victories in numerous local elections, including the mayoralty in San Luis Potosí, Guanajuato, and Ciudad Obregón. In the municipal elections in July 1983, PAN won 105 municipal posts in five states, including the mayoralties in Chihuahua, Durango, and Ciudad Juárez.

These results reportedly so upset PRI stalwarts that the practice of honest elections was discontinued, allegedly resulting in wholesale fraud later in 1983 in elections in Acapulco and the states of Sinaloa and Puebla, as well as the voiding of the opposition victories in Namiquipa, and Chihuahua in the state of Chihuahua. New elections in these areas were held in April 1984 in which the PRI reportedly used all its traditional practices to produce a near sweep. In two of its victories in towns in Chihuahua, the PRI's candidates were the people who, as PAN candidates, had had their 1983 victories annulled. As of mid-1984 it was unclear if this return to traditional electoral chicanery indicated that de la Madrid had pulled back from his goal of liberalizing the electoral system or if he had merely been unable to control the PRI's traditional *políticos*.

The third aspect of de la Madrid's attempted liberalization involved an effort to restructure the internal workings of the PRI. Reviving the practice of choosing PRI candidates for local races in primaries, which was tried in the 1960s but later abandoned, the party conducted eight experimental primaries in the state of Nayarit in April 1984 to choose municipal candidates for the scheduled July 1985 elections. In addition, when the party leaders gathered in March 1984 to celebrate the party's fifty-fifth anniversary, they decided to begin discussions about changing the party's internal structure. At issue were two conflicting proposals—one by the CTM to increase its weight in decisionmaking and one to create a fourth sector for businessmen. The proposal to integrate businessmen into the party, introduced by the governor of Nuevo León, Alfonso Martínez Domínguez, was attacked by Velásquez as "contrary to the principles" of the party. The conference adjourned without taking any action, but discussions continued throughout July 1984. Some analysts suggested that any attempt drastically to restructure the PRI in this way would split the party, while others pointed out that businessmen had long been active in party affairs through its popular sector. Given the party's Revolutionary heritage and the fact that a similar attempt to form a sector for businessmen in the late 1960s nearly caused the party's left wing to bolt, taking some unions with it, it appeared likely in mid-1984 that the party leaders and de la Madrid would move cautiously.

Foreign Relations

History and General Principles

Throughout most of its national history, Mexico's role in world affairs was minor. This was a reflection of internal instability during the nineteenth and early twentieth centuries and the overwhelming power of its immediate neighbor to the north. Since the mid-nineteenth century the country's overriding concern has been its relations with the United States. In 1847 it ceded half its national territory, encompassing most of what became the states of New Mexico, Arizona, California, Nevada, Utah, and Colorado, as a result of the Mexican-American War. (If the earlier loss of Texas is included, Mexico has lost almost two-thirds of its territory to the United States.) In addition, Mexico suffered military incursions by United States troops during the latter half of the nineteenth century and during the wars of the Mexican Revolution from 1910 to 1917. Analysts agreed that this history has produced a marked ambivalence among Mexicans concerning the United States: admiration for its economic and political accomplishments combined with a great fear of "the colossus of the north." This ambivalence was reflected in the fact that although good relations with the United States were a high priority for Mexico, it was considered a political liability for public officials to be too closely aligned with it.

As a reflection of its comparative geopolitical weakness, Mexico traditionally emphasized respect for international law in its foreign policy. Analysts noted that its foreign policy was guided by several principles: the juridical equality of states, the sovereignty and independence of all nations, nonintervention in the domestic affairs of other nations, the peaceful resolution of conflicts, and collective security through participation in international organizations. To these traditional principles the country has added several legal doctrines to international law: the right of a state to exercise authority over national property; the "Calvo Clause," which disallows appeals of national judicial decisions to extranational bodies unless such appeals are sanctioned by treaty; the "Drago Doctrine," which prohibits intervention by foreign powers to collect debts; and the "Estrada Doctrine," which grants international recognition automatically to de facto governments.

The country participated in the United Nations (UN), the Organization of American States (OAS), the successor to the Latin American Free Trade Association known as the Latin American Alliance for Economic Development, the Latin American Economic System (Sistema Económico Latinoamericano—SELA), and other international bodies. It was also a signatory of the Inter-American Treaty of Reciprocal Assistance (Rio Treaty) and was a leader in the drafting of the Tlatelolco Treaty, which prohibits the acquisition of nuclear weapons by Latin American countries. Mexico occasionally dissented, however, from decisions taken by these organizations (see National Security Concerns for Mexico , ch. 5).

Changes under Echeverría

Beginning with Echeverría's administration (1970–76), Mexico's foreign policy became more assertive and more active in world affairs than it had been traditionally. Mexico proposed the Charter of Economic Rights and Duties of States, which authorized the formation of commodity cartels and the expropriation of foreign investments, to the United Nations Conference on Trade and Development in 1972 and was instrumental in the formation of SELA and the Multinational Caribbean Shipping Fleet. Seeking to become a spokesman on Third World issues, Echeverría boycotted the Sixth General Assembly of the OAS held in Santiago, Chile, to protest the 1973 military coup that overthrew the constitutionally elected government of Salvador Allende Gossens and broke off diplomatic relations with Chile and South Africa over their violation of human rights. In addition, on many occasions he decried what he saw as a United States policy of favoring military regimes at the expense of democracies in Latin America and other Third World nations. Finally, Echeverría traveled widely, even visiting China in 1974, and signed the first agreements for commercial cooperation with the European Economic Community among the nations of Latin America.

Various motives were assigned to this new assertiveness. Some viewed it as an attempt to defuse domestic opposition on the left (stemming from Echeverría's role as secretary of government during the Tlatelolco Massacre of 1968) by forging an activist foreign policy independent of the United States. Others noted his personal ambition to become secretary general of the UN after leaving the presidency. In addition, the more activist policy was seen as an attempt to seize the leadership of a movement among Latin American countries to adopt a more nationalistic position in their relations with the United States. Mexico's need to diversify its trading partners in the face of a growing balance of payments deficit and an increasingly protectionist United

States also played a role.

The Impact of Oil

The discovery of huge petroleum reserves in Mexico in the 1970s, when the world was still recovering from successive oil shortages and the subsequent inflation and recession, ensured that the activist stance in world affairs begun by Echeverría would continue under López Portillo (1976–82) (see Petroleum, ch. 3). Not only did the possession of oil give the country a new importance in the eyes of the world, and especially in the eyes of the United States, but it also had a tremendous effect on the way Mexicans viewed their place in the world. In Mexico oil was seen not only as the solution to domestic economic problems but also as giving the country the potential to become a major actor in hemispheric and world affairs. Although less strident than his predecessor, López Portillo continued the policy of seeking to influence the Third World by breaking diplomatic relations with Nicaragua in early 1979 at a critical juncture in that country's revolution against Anastasio Somoza Debayle, joining Venezuela in supplying oil to economically pressed Caribbean and Central American countries at preferential prices, proposing before the UN General Assembly in 1979 the creation of a global energy plan designed to help fulfill the needs of all nations and following France's lead calling for a North-South Conference (also called the Cancún Conference), which Mexico hosted in 1981. When de la Madrid came into office in 1982, therefore, Mexico was already an important actor on the world stage.

Foreign Policy Decisionmaking

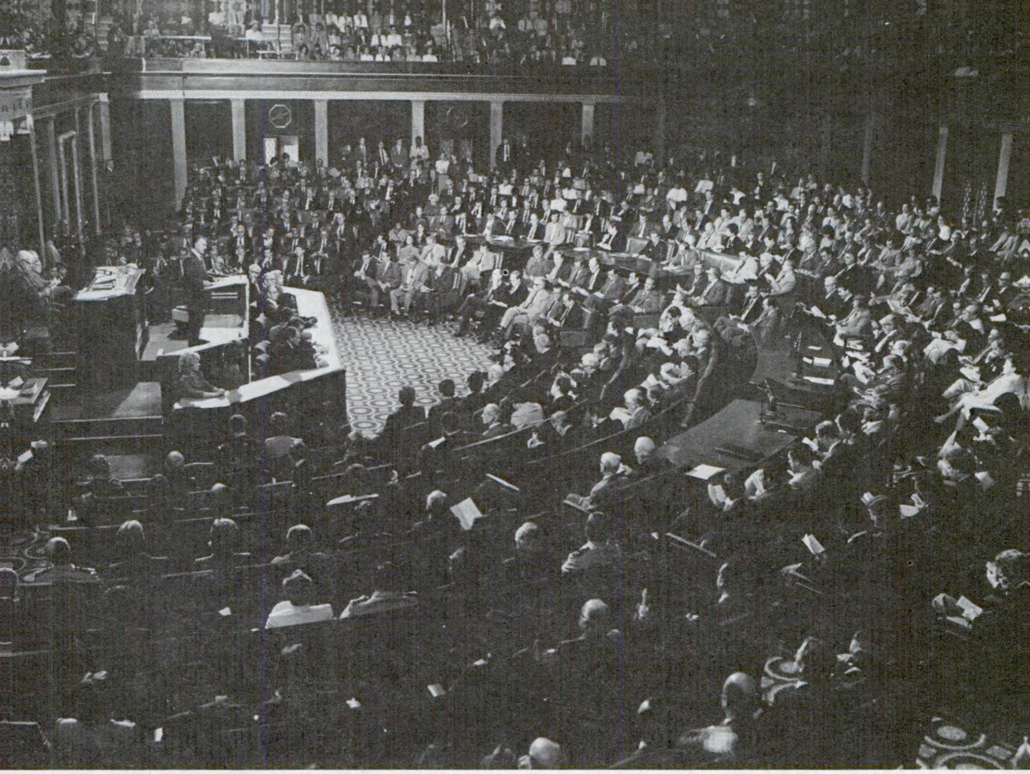
The range of the president's powers and responsibilities in foreign policy matched those in domestic policy. The Constitution and laws give him the authority to bestow or withdraw diplomatic recognition on and from foreign states; accredit foreign diplomats; appoint the country's diplomatic and consular agents abroad; negotiate and sign treaties, with senatorial concurrence; extend or deny asylum to political refugees; and order the expulsion of foreigners. As commander in chief of the armed forces he could, with the consent of the legislature, declare war. He was also the ultimate arbiter on questions of exchange controls and currency devaluation, compensatory trade agreements, tariff schedules and export duties, tourist regulations, the rights and obligations of foreign investors, international aviation, and migratory labor.

In exercising these powers, the president was assisted by the Secretariat of Foreign Relations and a group of staff agencies, including the Bank of Mexico and the Secretariat of Finance, and the Subsecretariat of Special International Studies and Affairs within the Secretariat of Foreign Relations; the Mexican Institute for Foreign Trade; and the Mexican Institute for Diplomatic Studies. Analysts noted that these agencies created a core of staff resources and influence, thus permitting the development of a comprehensive perspective on foreign affairs that was more than the sum of the positions taken by individual agencies and interest groups. The exercise of foreign policy tended to be centralized; decisions were carried out with little debate or dissension. Analysts noted a tendency for Mexican diplomats to seek to develop foreign contacts outside diplomatic structures in an attempt to bypass what some considered a rigid hierarchy in foreign affairs. The fact that the country spoke with a single voice in foreign relations, however, was largely attributed to this centralized structure.

Relations with the United States

Analysts described the relationship between Mexico and the United States as one of asymmetrical interdependence in which both countries derived substantial economic benefits from their proximity but in which the United States was the dominant partner. It was generally agreed that a tacit understanding existed between the two countries, whereby Washington recognized and accepted Mexico's need to dissent from United States foreign policy in everything that was fundamental for Mexico, even if it was important but not fundamental for the United States. As economic questions became increasingly important as the two economies became intertwined during the period of Mexican growth after 1940, serious disagreements between the two countries arose over a wide range of issues. Beginning in the late 1970s, disagreements also arose over the appropriate response to revolutionary activity in Central America (see Latin American Relations, this ch.).

The border between the two countries is 3,326 kilometers long. Many considered the border region, encompassing the Mexican states of Baja California Norte, Sonora, Chihuahua, Coahuila, Nuevo León, and Tamaulipas and their United States



President Miguel de la Madrid Hurtado addressing joint session of United States Congress in May 1984
Courtesy United States Congress/K. Jewell

counterparts—California, Arizona, New Mexico, and Texas—to be a single economy involving some 170 million border crossings each year (about 60 percent of which originated in Mexico) and total border transactions that exceeded US$9 billion in 1981. Analysts estimated in 1984 that 80 percent of Mexico's external debt was to United States public and private financial agencies, that Mexico sold 70 percent of its exports to the United States and received 80 percent of its imports from the United States, and that it relied on United States citizens for 80 percent of its tourist trade. In addition, United States manufacturers operated some 600 assembly plants on the Mexican side of the border (known as "in-bond" plants or *maquiladoras*—see Glossary), where they took advantage of Mexico's lower wages. The level of economic interdependence between the two countries prompted repeated suggestions from the United States in the late 1970s and early 1980s that a North American Common Market be formed. Mexico, fearing increased economic dependency, resisted these overtures (see Forces of Change: Three Development Experiences, ch. 2; Foreign Trade, ch. 3).

The complex relations in the border region were managed by a plethora of bilateral agencies and commissions. According to the United States Department of State, 85 different United States agencies were active in United States-Mexican relations. Among the bilateral agencies were the United States-Mexico Border Health Association, sponsored by the Pan American Health Organization, which was concerned with the effective use of health care facilities in the border region and preventive medicine programs; the International Boundary and Water Commission, which was concerned with boundary and surface water problems, such as the salinity of the Colorado River; the United States-Mexican Mixed Commission for Science and Technology, which planned and coordinated bilateral scientific and technical cooperation; and the United States-Mexico Joint Commission on Commerce and Trade. There were also a number of commissions formed between states on both sides of the border and informal associations that operated across the border. Much border-region cooperation and contact went on in unofficial channels, sponsored by the communities themselves.

In 1984 the most pressing bilateral problems involved trade, illegal migration, and fishing. In order to promote investment and employment and to pay off its international investment debt, Mexico must export manufactured products. Mexico considered the logical market for those exports to be the United States. In promoting exports, however, Mexico employed a variety of subsidies and incentives, some of which the United States considered illegal. Because Mexico was not a member of the General Agreement on Tariffs and Trade (GATT), United States manufacturers needed only to demonstrate that Mexico applied a subsidy illegal under United States law to the product to have countervailing duties applied to it by the United States, thereby pricing it out of the market. To solve this problem, Mexico sought a bilateral subsidies agreement with the United States; one agreement was signed in December 1979 but was never ratified by the United States. Beginning in 1980 the United States position was that Mexico should join GATT. López Portillo, however, under pressure from CONCAMIN and the Tello faction of the PRI, decided not to join, arguing that Mexico was a developing country and entitled to protect its industries from foreign competition, a policy that would not be possible under the provisions of GATT. De la Madrid, although thought to favor entering GATT, pressed the United States to institute an "injury test," under which a United States manufacturer would have to show commercial damage before countervailing duties could be applied. Such a damage test was provided for under United States law for products listed as part of the Generalized System Preferences (GSP). The United States, however, argued that the GSP was designed to assist only developing countries, of which Mexico was no longer one, and gradually removed Mexican products from the list. In mid-1984 no resolution of the dispute had been reached, but negotiations were proceeding on a "subsidies agreement."

The United States did, however, take steps to assist Mexico with its financial crisis in 1982. Noting that the Mexican economic slump had cost some 200,000 jobs in the United States through lost exports, that 80 percent of Mexico's foreign debt was owed to United States financial institutions, and that Mexico was its largest single supplier of oil, the United States took the position that the economic stability of the country was important to its interests. It therefore joined 11 other countries in a US$1.9 billion short-term bridge loan to Mexico through the Bank of International Settlements, extended US$1.7 billion in agricultural credits through the United States Commodity Credit Corporation, US$300 million in loans, guarantees, and insurance through the United States Export-Import Bank, and made an advance payment of US$1 billion for petroleum purchases for the United States Strategic Petroleum Reserve in 1983.

In addition to trade, illegal migration remained a pressing issue between the two countries in 1984. North American observers estimated that there were between 2 and 6 million undocumented aliens residing in the United States in 1983, about one-half of whom were thought to be Mexicans. Mexican sources estimated that between 1.5 and 1.9 million Mexicans worked illegally in the United States every year. Some argued that the number varied and that some 500,000 Mexicans lived illegally in the United States on a permanent basis, the number rising to between 1.5 and 1.8 million during summer and fall harvests. The United States, arguing that the undocumented workers took jobs away from its citizens, stepped up border patrols and pressured Mexico to deal with the problem. Under López Portillo, Mexico noted that the basis of the problem was that there were some 650,000 to 700,000 new entrants into its work force each year but that its economy could provide employment for only 400,000. Thus it took the position that the solution to the problem lay in increased Mexican exports to the United States that would increase economic growth and create jobs. De la Madrid did not substantially alter this view. In 1984 the Simpson-Mazzoli Immigration Reform Act was introduced in the United States Congress but failed to achieve passage. The Senate version of the bill would have granted amnesty to undocumented residents who could prove continuous residence in the United States since January 1, 1980, and would have imposed fines on United States employers who knowingly hired undocumented workers. The House of Representatives version, which would also have permitted up to 50,000 Mexicans per year to enter the United States for nine to 12 months as guestworkers, caused the Mexican government to express concern for the rights of its citizens living in the United States. Analysts noted that Mexico benefited economically from the money that workers in the United States sent back to Mexico (amounting to more than all of Mexico's receipts from tourism) and benefited politically from the "safety valve" of migration, which reduced the pressure on the Mexican government to solve basic economic and social problems.

The fishing dispute was related to Mexico's claim, beginning in 1976, to exclusive rights to all marine resources inside a 200-nautical-mile Exclusive Economic Zone off its coasts. Under a 1976 agreement, United States boats were guaranteed a quota for tuna caught inside this zone, and under a 1977 agreement, Mexican boats were permitted to fish for squid off the eastern seaboard of the United States. When there were delays in granting permits to United States boats, the United States responded (as required by United States law) by delaying permits to Mexican boats. In July 1980 the Mexican navy began seizing United States boats fishing in Mexican waters without permits, to which the United States responded by barring all Mexican exports of tuna into the United States. In December 1980 Mexico canceled both the 1976 and the 1977 agreements. In 1983 the United States took the position that Mexico did not have the right to regulate tuna fishing (tuna being a migratory species) and encouraged Mexico to sign the Eastern Pacific Ocean Tuna Fishing Agreement adhered to by the United States, Costa Rica, Panama, Honduras, and Guatemala. Mexico objected to this because it felt this agreement denied it the right to manage fishing within its territorial waters. As of mid-1984 the dispute had not been settled; the United States embargo remained in effect.

Latin American Relations

Mexico was a founding member of what came to be known as the Inter-American System at the First International Conference of American States, held in Washington in 1889–90 for the purpose of establishing guidelines for the conduct of relations among the states of the Western Hemisphere. Building on this, Mexico participated in the forming of the Pan American Union in 1910 and the OAS in 1948. Of the three basic documents of the Inter-American System—the Charter of the Organization of American States, the Inter-American Treaty of Reciprocal Assistance (Rio Treaty), and the American Declaration on the Rights and Duties of Man (incorporated into the American Convention on Human Rights in 1969)—Mexico has ratified only the first two. Further, although it joined in the resolutions of the OAS in 1948 and 1951 condemning "communism in the Americas," it dissented from the 1954 Caracas Resolution, which was directed at the government of Jacobo Arbenz Guzmán in Guatemala; opposed the imposition by the OAS of economic sanctions against Cuba in 1962, 1964, and 1967; and opposed the interventions in the Dominican Republic in 1965 and Grenada in 1983.

Mexico joined the United States, Canada, and Venezuela in the Caribbean Basin Initiative in 1980 but attached three conditions to its participation: that the undertaking exclude military aid; that its overall purpose be to assist the peoples of the region rather than to launch an anticommunist crusade; and that no country in the hemisphere be automatically excluded from its benefits. Concretely, Mexico joined Venezuela in 1980 in establishing the Joint Oil Facility (under the terms of the San José Accord), in which Mexico agreed to supply up to 160,000 barrels per day to 10 countries of the Caribbean Basin at special rates through credits that amounted to 30 percent of their respective oil purchases for five years at 4 percent annual interest. If all the money saved as a result of these credits was invested in energy development, the credits could be extended to 20 years at 2 percent annual interest (increased to 4 percent in 1983). In August 1984 Venezuela and Mexico renewed the accord, again adjusting the credit terms, but added the stipulation that the credits were to be made available only to those countries that, in their judgment, did not engage in "warlike actions" against their neighbors. This was generally seen as an attempt to reinforce the Contadora peace initiative, in which both countries were participants.

Central America

The various internal conflicts that broke out in Central America in the late 1970s and early 1980s, including the Nicaraguan Revolution, the civil war in El Salvador, intermittent civil war in Guatemala, and border tensions between Nicaragua and Honduras and Nicaragua and Costa Rica, posed a serious foreign policy problem for both the United States and Mexico. Although both countries viewed the problems of the region as extremely grave and were concerned with the possibility that hostile governments might come to power on the isthmus, they adopted different analyses of the situation and followed different directions in policy. In the early 1980s the United States, while recognizing the role played by political, economic, and social conditions in the region, viewed the problems as fundamentally linked with its global relationship with the Soviet Union. Mexico, in contrast, analyzed the situation as rooted in the highly oligarchic social and economic conditions in these countries and the refusal of their mostly military-based governments to yield to widespread demands for reform. This intransigence, in Mexico's view, inevitably led indigenous reform elements to take up arms against their governments, worsening the crisis and ultimately producing a revolutionary situation with unpredictable consequences. Based on this analysis, Mexico adopted the position that attempts to prop up the weak governments in the region were doomed to failure and that a more appropriate policy would be to reach an accommodation with the revolutionary movements and seek to lessen tensions through a series of negotiations.

Toward that end, under López Portillo, Mexico attempted to mediate in the civil war in El Salvador. When that effort failed, Mexico joined France in 1981 in declaring the Salvadoran rebels "a representative political force" and opposed the United States-supported Salvadoran elections in March 1982. On the broader question of Central America as a whole, Mexico identified United States relations with Cuba, United States relations with Nicaragua, and the United States position on the civil war in El Salvador as three areas of tension in the region. To deal with these areas Mexico encouraged the United States to negotiate directly with Cuba and Nicaragua and to recognize the rebels in El Salvador as legitimate political forces or, failing that, to reduce its military aid to the Salvadoran government. In early 1982 Mexico proposed that the United States renounce any threat or use of force against Nicaragua, that the anti-Sandinista forces training in Honduras and Florida be disbanded, and that simultaneously Nicaragua should renounce the acquisition of arms, reduce the size of its army, and conclude a series of nonaggression pacts with its immediate neighbors and the United States.

In January 1983 Mexico joined Venezuela, Colombia, and Panama in forming what came to be known as the Contadora Group (named for a Panamanian island where they first met) to discuss the possibility of joint action to defuse the increasingly explosive situation in the region. Following a series of consultations with all the governments of the region throughout 1983, the group developed a 21-point outline agreement, made public in January 1984, that would commit the countries in Central America to improving democratic institutions and human rights guarantees; drawing up detailed inventories of armaments, armed forces, and foreign military advisers with a view to reducing all three; and ending all support for rebel forces operating against the governments of the region and the arms traffic on which they depended. In June 1984 the "Draft Treaty on the Maintenance of Peace, Security, Economic Cooperation, and the Strengthening of Democratic Institutions in Central America" was submitted to the five governments of Central America. No further action had been taken by the Contradora Group as of July 1984.

Observers noted that de la Madrid adopted a considerably less strident tone with the United States than had his predecessor. Further, Mexico appeared to have moderated its policy concerning the government of El Salvador, as evidenced by its official participation at the inaugural ceremonies for El Salvador's new government in 1984 and repeated statements by Mexican officials that Mexico did not "support" the rebels in El Salvador but merely recognized them as a necessary party to any solution to the problems of that country.

Analysts suggested that the country's policy positions in Central America stemmed from a mixture of motives. Some argued that Mexico, particularly under López Portillo, felt some affinity for the revolutionary forces in the region both because of the country's own revolutionary past and because the anti-United States tone of most of the rebels struck a chord with Mexico's own fears of the United States. Others argued that what Mexico feared most was a long period of turmoil in the region that would lead to large numbers of refugees entering Mexico, exacerbating Mexico's own social problems, and perhaps even becoming involved in revolutionary activity in Mexico. Others suggested that the turmoil, if not checked, might lead to an increase in United States military presence in the area, which Mexico, given its foreign policy traditions, would have to oppose. This, some Mexicans feared, might lead the United States to seek to destabilize Mexico in the hope of bringing to power a government more amenable to direction from Washington. Finally, some analysts saw Mexico's actions as consistent with a long-term trend in Mexican foreign policy, begun under Adolfo López Mateos and accelerated by Echeverría and López Portillo, of projecting its power into the Caribbean Basin in response to its own economic need for export markets and to the political vacuum left by a perceived weakness of the United States in the area.

Relations with Nicaragua

In May 1979, in a break with diplomatic precedent, Mexico severed diplomatic relations with the Nicaraguan government of Anastasio Somoza, then locked in the final stages of its battle against the Sandinistas. Costa Rica had previously taken a similar action, and both countries justified the unusual step by citing Nicaragua as "a case of truly unusual, exaggerated violation of human rights" and condemning "the use of enormous military power that the National Guard disposes of toward a helpless population." Analysts suggested that Mexico took this action because it saw the Somoza government as doomed to fall in the face of wide repudiation by its citizens and because it viewed the Sandinista coalition, then encompassing broad sectors of Nicaraguan society, as similar to its own Revolutionary coalition and likely to follow domestic policies roughly similar to Mexico's: a mixed economy and a respect for private property but firm rules regarding foreign investment.

After the fall of Somoza in July 1979, Mexico moved to help shore up the new government. It urged the United States to foreswear military intervention and proposed that the United States and Nicaragua sign a nonaggression pact; joined Venezuela in providing oil for the hard-pressed Nicaraguan economy through the San José Accord; served as guarantor of Nicaragua's external debt before the international banking community, using its own oil reserves as collateral; and provided an estimated 16 to 21 percent of all aid received by Nicaragua from 1979 to 1981 from Latin American countries in the form of technical support for communications, transportation, mining, fishing, social welfare, food distribution, health, and housing. In addition, PEMEX engaged in oil exploration in the hope of reducing Nicaragua's heavy dependence on imported supplies.

Much of this aid continued after de la Madrid came to power in 1982. However, as the Sandinista coalition narrowed, Mexico adopted a somewhat less supportive attitude, although it still sought to act as mediator between Nicaragua and its immediate neighbors, as well as with the United States. In June and July 1983 Mexico suspended petroleum shipments to Nicaragua for failure to keep up with its payments. (Venezuela had halted its shipments in August 1982 for the same reason.) In July 1984 de la Madrid publicly warned the Nicaraguan government to avoid dependence on the allies of the Soviet Union if it wished to avoid confrontation with the United States. Analysts differed on whether these moves signaled a new Mexican policy toward

Nicaragua or merely reflected Mexican concern for the increasingly narrow political base of the Nicaraguan government.

Relations with Guatemala

Mexico tried not to link problems in Guatemala with the general problems of Central America. The country's shared border with Guatemala had long led to tensions between the two countries, and some suggested that Mexican relations with Guatemala paralleled United States relations with Mexico. From the Mexican point of view, Guatemalans illegally crossing the border depressed the wages of Mexicans in the southern states of Chiapas, Tabasco, and Quintana Roo. Border tensions increased during the simmering civil war in Guatemala throughout the 1970s and early 1980s as a succession of military governments in Guatemala appealed to Guatemalan xenophobia in an attempt to gain popular support. A counterinsurgency campaign by the Guatemalan Army in its northern departments of Quiché and Petén in February 1982 caused alarm in Mexico, which feared that the Guatemalan insurgents would retreat across the border into Chiapas and that the Guatemalan Army would pursue them. Not only would this have represented a violation of Mexican sovereignty, but it might also have threatened Mexico's major oil fields near the Guatemalan border. Several such incursions into Mexico were reported in the Mexican press from 1981 through 1984.

These tensions were exacerbated by large numbers of Guatemalan refugees (estimated to be as many as 100,000) in Chiapas and Oaxaca, whom Mexico began to expel in July 1981. The operation was halted following a storm of protest in Mexico. In response to a Guatemalan claim that Mexico was harboring insurgent training camps, Mexico conducted military exercises in December 1981 in Chiapas and invited Guatemala to send observers to satisfy themselves that the alleged training camps did not exist. However, raids on the refugee camps by unidentified forces continued throughout 1982 and 1983. In July 1984 Mexico decided to reduce tensions on the border by forcibly moving the refugees to new camps much farther from the border (see The Rural Society, ch. 2; National Security Concerns for Mexico, ch. 5.).

Relations with Cuba

Despite strong pressure to do so from the United States and the OAS, Mexico was the only Latin American country that did not break diplomatic relations with Cuba after Fidel Castro Ruz came to power in that country. Throughout the 1960s Mexico maintained its air link with Havana while the other countries of the hemisphere were boycotting the island. Mexico criticized the Bay of Pigs invasion in 1961, opposed the suspension of Cuba's participation in the OAS in 1962, opposed the 1964 resolution of the OAS directing its members to sever diplomatic relations with the island, and received Castro in an official state visit in 1980. In addition, Mexico assisted in Cuban oil exploration efforts and tried unsuccessfully to have Cuba participate in the North-South Conference in Cancún in 1981. In 1980 López Portillo visited Havana and joined Cuba in comdemning the United States economic blockade of the island and its maintenance of the naval base at Guantanamo Bay. De la Madrid. in reference to Cuba, declared that his government believed in the principles of self-determination and nonintervention and thus supported Cuba's right to determine its own political destiny. In June 1984 the two countries signed an agreement for economic cooperation in the sugar and engineering industries.

Analysts generally attributed this policy to a desire to demonstrate Mexican independence and also to ensure internal political stability in Mexico by giving the country's foreign policy a more "revolutionary" tone and thus keeping the left wing of the PRI, including former president Cárdenas, faithful to the regime. In addition, observers noted that although Cuba actively supported guerrilla movements throughout the rest of Latin America in the 1960s, it offered no aid to those in Mexico, which suggested an implicit bargain between the two nations.

Extra-Hemispheric Relations

Mexico expanded the number of countries with which it had diplomatic relations to 137 during the López Portillo administration. It accepted its elected seat on the UN Security Council for the first time in 1980. Analysts noted that Mexico seemed to prefer action through the UN to action within the OAS, which it saw as dominated by the United States. It was active, beginning in the early 1970s, in negotiations attempting to create the New International Economic Order and the gamut of development issues grouped under the "North-South Dialog." It also participated in negotiations concerning the Law of the Sea, the United Nations Conference on Trade and Development, the International Labor Organization, the Food and Agriculture Organization, the World Health Organization, the IMF, and the World Bank (see Glossary). Through these organizations the country supported the development of a worldwide food policy, a world energy policy, the nonproliferation of nuclear weapons, and the general strengthening of international institutions. It resisted, however, joining GATT and was not a member of the Nonaligned Movement in mid-1984.

As Mexico became a major oil producer after 1978, it sought to broaden its trading partners so as not to become the major supplier of petroleum to the United States. Thus, it entered into several supply contracts with Japan and actively sought Japanese investment in Mexico. Under these agreements Mexico received not only cash payments for its oil but also packages of capital, producers' goods, and technical systems for developing new industries. In 1983 Japan was Mexico's third largest trading partner.

Under pressure from private industry, de la Madrid began discussions with the Council for Mutual Economic Assistance (CEMA—also known as Comecon), the economic integration organization among the Soviet Union and its allies, concerning broadening Mexico's trade with those countries. In 1983 Comecon's willingness to enter into barter agreements instead of hard-currency transactions was seen as a way of broadening Mexico's trade without straining its balance of payments problems. Although the volume of trade had not reached significant proportions by mid-1984, it marked a potentially significant increase in Mexican interactions with Eastern Europe.

As of mid-1984 Mexico was not a member of the Organization of Petroleum Exporting Countries (OPEC). The country considered joining the organization in 1975, when its oil reserves were first becoming apparent, but when the United States passed an amendment to the Foreign Trade Act that year that provided for mandatory trade penalties against all members of OPEC, Mexico dropped the idea. It pursued independent production and pricing policies through 1982, although it did generally follow OPEC's lead.

De la Madrid, however, favored closer relations with OPEC early in his administration. Before coming to office, his transition team recommended exploring cooperation agreements and consultative committees with the larger OPEC producers, to be followed by technical cooperation and information exchanges at a later date. In January-February 1983 a team consisting of officials from PEMEX and the secretariats of foreign relations, commerce and industrial development, finance, and energy, mines and parastatal industry visited four OPEC countries and Britain for the purpose of bringing Mexico's pricing and production closer into line with OPEC. It agreed with Britain to consult with OPEC countries on future pricing and production and, beginning in March 1983, pegged its oil price to the OPEC price.

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The best English-language studies of Mexican politics available in 1984 were Daniel Levy and Gabriel Székely's *Mexico: Paradoxes of Stability and Change* and Martin C. Needler's *Mexican Politics: The Containment of Conflict*. Neither, however, was published soon enough to give major attention to changes taking place under President de la Madrid. Roger O. Hansen's *The Politics of Mexican Development*, although becoming dated, continues to provide the best analysis of the PRI. The articles on Mexico in *Latin America and Caribbean Contemporary Record*, edited by Jack W. Hopkins, provide useful information on political and economic events, as do the articles on Mexico in the yearly special issue of *Current History*. The *Mexican Forum* publishes abridged versions of research papers published by the Institute of Latin American Studies of the University of Texas at Austin and also provides a summary of recent events. Information on contemporary events was available in the *Latin America Weekly Report* and *Latin America Regional Reports: Mexico and Central America*, both published by Latin American Newsletters of London, and in various issues of the *Financial Times*, the *New York Times*, the *Los Angeles Times*, the *Washington Post*, the *Wall Street Journal*, and the Mexican newspapers *Excélsior*, the *News*, and *Uno Más Uno*. A useful compendium of English-language newspaper articles on Mexico is the *Information Service on Latin America*.

The most useful analyses of Mexican foreign policy are contained in *The Caribbean Challenge: U.S. Policy in a Volatile Region*, edited by H. Michael Erisman; *Central America: International Dimensions of the Crisis*, edited by Richard E. Feinberg; *The Future of Central America: Policy Choices for the U.S. and Mexico*, edited by Richard R. Fagen and Olga Pellicer; *Mexico-United States Relations*, edited by Susan Kaufman Purcell; and *United States Relations with Mexico: Context and Content*, edited by Richard D. Erb and Stanley R. Ross. (For further information and complete citations, see Bibliography.)

Chapter 5. National Security

*Mexican Revolutionary soldiers adapted from
a painting by David Álfaro Siqueiros*

BY MID-1984 the traditional Mexican definition of national security, and the role played by the armed forces in supporting it, was changing. Since the bloody Revolution initiated in 1910 and subsequently successful efforts at removing from the military's hands the reins of political power, the armed forces had been relegated the responsibilities of guaranteeing domestic political stability and carrying out development-oriented civic action programs in fulfilling their duties as the "servant of the people." Planning for national security was conducted by the ruling civilian elite, whose concerns focused primarily on safeguarding the country's economic independence, quelling social unrest, and eliminating occasional guerrilla insurgency.

This picture began to change during the administration of President José López Portillo y Pacheco (1976–82). The discovery and exploitation of vast new petroleum reserves brought Mexico renown as a world energy supplier. Because of the country's 50-year record of political stability and its relatively advanced industrial development, Mexico came to be recognized as a middle-level world power during the late 1970s. As a result of this newly acquired international prestige, the importance of the nation's armed forces, which had until then achieved notoriety as being one of the most poorly paid and ill-equipped in the Western Hemisphere, also increased. Under the guidance of López Portillo's secretary of national defense, Félix Galván López, the most ambitious military modernization program in Mexican history was initiated with three immediate goals: to increase the size of the armed forces, to improve education and training, and to upgrade aging equipment.

When Miguel de la Madrid Hurtado assumed the presidency in December 1982, he inherited a country wrought with serious international financial and domestic economic difficulties. The need for the new administration to reassess traditional national defense concerns became more pressing as it was forced to recognize the strategic importance and vulnerability of its oil reserves, the impact of tens of thousands of Central American refugees—mainly Guatemalan—on the already depressed Mexican economy, and the threat of a regionalized war expanding northward into Mexican territory. Although the de la Madrid administration managed to steer a middle course in supporting a political solution to the violence in Central America through the negotiations of the Contadora Group, it also bolstered the military presence along its border with Guatemala and increased patrols of its territorial waters. In spite of the country's economic hardships, President de la Madrid pursued a scaled-down program of modernization for the armed forces and, perhaps of even greater long-term significance, began to include high-ranking military officers in national security planning.

Position of the Armed Forces in Government and Society

Constitutional and Legal Basis

The Constitution of 1917 established the guiding principles for the armed forces and set restrictions on their activities. Article 89 places the military under the control of the president of the republic, who acts as commander in chief in seeing that the armed forces fulfill their obligation to guarantee "internal order and external defense." The restriction on peacetime interference by military authorities in civilian affairs or other activities not "directly connected with the military discipline," as set forth by Article 129, has often been abused, however, usually on the orders of the president. The final constitutional provision for establishing government control of the armed forces, Article 132, places all military facilities and properties under federal jurisdiction.

A series of laws enacted in 1926 further shaped the organization and defined the mission of the armed forces. The most important of these was the Organic Law, which provided the legal basis for the military and represented one of the first attempts to professionalize it by establishing regulations and formal procedures. The Organic Law specifically defined for the armed forces a threefold mission: "to defend the integrity and independence of the nation, to maintain the constitution, and to preserve internal order." Subsequent modifications to this basic law have enabled the military to keep pace with political, economic, and social changes in the Mexican state.

Three additional laws enacted in 1926 also sought to regularize military practices. The Law of Promotions and Compensation established a pay scale for each rank and competitive examinations for promotions. The Law of Military Discipline further defined the obligations of the armed forces to society in requiring that each soldier "in fulfillment of his duties, sacrifice all personal interests to the sovereignty of the nation, to loyalty toward its institutions, and to the honor of the National Army." The Law of Pensions and Retirement set a mandatory retirement age and provided pensions for military retirees and allowances for military dependents. Although all of these laws have since been modified to meet the needs of changing times, they formed the foundation promoting the institutional development of the Mexican military.

Background and Traditions of the Armed Forces

Apart from its constitutional and legal framework, the military institution has also been shaped by a rich heritage dating back to the pre-Columbian era. Historical articles highlighting this tradition are regularly included in the *Revista del ejército y la fuerza aérea,* the official journal of the Mexican armed forces.

As early as the beginning of the fifteenth century, the Aztec army had achieved a high degree of military organization that included formal education and training, weapons production, war planning, and the execution of coordinated operations (see The Aztecs, ch. 1). The importance of military service was impressed upon each young male through the ritual of declaring to him shortly after birth that his destiny was to be a warrior and to die in combat, the most honorable death in Aztec culture. The powers of the Triple Alliance, formed by the urban centers of Tenochtitlán, Texcoco, and Tlacopán (now known as Tacuba), were reportedly capable of assembling a military force of between 16,000 and 18,000 combatants, roughly 10 percent of the male population, on an hour's notice. Evidence of this indigenous influence on the modern military is found in the insignia of the Superior War College, which incorporates in its design the profile of an Eagle Warrior, one of the Aztec society's fighting elite.

At the beginning of the sixteenth century, the forces of the Triple Alliance were at the peak of their military development. Nevertheless, on the arrival in 1519 of the Spanish conquistadores, led by Hernán Cortés, the native warriors were unable to compete militarily. The two materially decisive factors in the Spaniards' victories were their firearms and the mobility gained from horses, elements of battle that had been previously unknown to the Aztecs. The alliance of rival indigenous communities with the Spanish and the belief of the Aztec ruler Moctezuma II that Cortés was the Toltec god Quetzalcoatl, whose return was predicted by legend, also contributed to the downfall of the Aztec civilization. Despite the Aztecs' continued battles and subterfuge, the Spaniards succeeded in superimposing their own theocratic-militaristic traditions on the conquered society.

The influence of nearly three centuries of Spanish colonial rule on the modern Mexican armed forces has been minimized as much as possible. The practice of granting to military officers special rights or privileges *(fueros)* that enabled them to "make sport of justice, avoid payment of their debts, establish gambling houses, and lead a dissolute life under the protection of their epaulets" was not abolished until 1855. Troops were recruited by forced conscription and were often composed of criminals or other social undesirables whom local strongmen (caciques) wished to be rid of. These practices led to a sharp divison between the ranks of the officer corps and enlisted personnel that has only slowly been eliminated over the past century, in good part because of the influence and the myth of the Revolution. Two more positive legacies remaining from the years of colonial rule include the adoption of Spanish military ranks, some of which have no direct equivalent in the United States armed forces, and the prestige traditionally accorded to cavalry units.

According to one historical account, military operations during the Wars of Independence were divided into four phases. In the first phase the precursor of the first independent Mexican military force was formed when Father Miguel Hidalgo y Costilla, a parish priest, issued the now-famous Grito de Dolores (Cry of Dolores) on September 16, 1810, calling for an end to Spanish rule (see Wars of Independence, ch. 1). Together with his second-in-command, Ignacio Allende, a former colonial cavalry captain, Hidalgo led a poorly armed force of Indian and mestizo peasants, which at one point reportedly numbered as many as 80,000, in disorganized attacks on Spanish-controlled towns and villages throughout central Mexico. The second phase began after Hidalgo's capture and execution in 1811, when Father José María Morelos assumed the leadership of the independence movement. In carrying out guerrilla-style operations with an estimated 9,000-man army equipped with weapons captured from the Spanish, Morelos controlled areas spanning from central Mexico to the Pacific coast and had encircled Mexico City by early 1813. His capture and execution in 1815 left the movement without unifying leadership. The third phase, following Morelos' death, was characterized by uncoordinated rebel bands led by guerrilla chieftains—among them, Guadalupe Victoria and Vicente Guerrero, both of whom later became presidents—that continued to undermine Spanish control.

It was not until political events in Spain provoked a wealthy conservative Spanish army officer, Agustín de Iturbide, to revolt against his superiors and to form a tenuous military alliance with Guerrero that the final phase of the independence struggle began. As part of the 1821 Plan of Iguala issued by Iturbide and Guerrero, the Army of the Three Guarantees, composed of approximately 16,000 men, was created under Iturbide's command and quickly succeeded in routing the Spaniards. When full independence was achieved with the 1822 coronation of Iturbide as the "constitutional emperor" of Mexico, the revolutionary force became the first standing Mexican military body, known as the Mexican Imperial Army, an almost exact copy of the Spanish colonial militia. Although the army's officer corps was composed exclusively of individuals of direct Spanish descent, the rank and file were mainly composed of Indian peasants, according to one source, recruited by raids on villages in the mountains and brought down in chains to the cities. The desertion rate was high among these "recruits," who remained untrained and ill-equipped for military confrontation.

For the first 30 years following independence, military officers played the dominant role in the country's political life, which was characterized by numerous "pronouncements" *(pronunciamientos)* and barracks revolts *(cuartelazos)* against the central government. According to one analyst, these practices even became somewhat institutional, wherein "a group of generals, led by a caudillo (strongman), would 'pronounce' against the government, compose a 'plan' denouncing it with an abundance of patriotic rhetoric and promising reform, and by offering to share the rewards of victory would frequently seduce any forces which might be sent against them." One of the most vilified and cunning of the military caudillos to emerge during this period was General Antonio López de Santa Anna Pérez de Lebrón, a former colonial army officer who led the first revolt against Iturbide and, between 1833 and 1855, served as president on 11 different occasions.

Among the infamous deeds for which Santa Anna was most noted were his military defeats that led to the loss of roughly one-half of Mexican territory to the United States under the 1848 Treaty of Guadalupe Hidalgo, the peace settlement to the Mexican-American War. The war itself had grown out of a dispute over land claimed jointly by the United States and Mexican governments when Texas joined the Union in 1845 (see The Mexican-American War, ch. 1). The James K. Polk administration, eager to fulfill the United States claim to "manifest destiny," sought a pretext to declare war on Mexico and, on finding it, did so on May 9, 1846. Although the United States initially employed a three-pronged attack on northern Mexico, the decisive battles were waged by General Winfield Scott's 15,000-man Army of Occupation as the United States troops made their way from Veracruz to the Mexican capital. In the political chaos that prevailed in Mexico at the time, Santa Anna had again assumed the presidency and, as

Scott's men neared, had gathered an army to defend the capital. For some three weeks Scott's troops laid siege to the city, while Santa Anna, on seeing his defeat at hand, abandoned his command and resigned the presidency. The final, decisive Battle of Chapultepec was fought in hand-to-hand combat on September 13, 1847, reportedly by some 1,100 Mexican troops and cadets against 7,000 United States soldiers at Chapultepec Castle, the site of the Heroic Military College. The legend of the Child Heroes (Niños Héroes) was created because, reputedly, the last defenders of Chapultepec were the young cadets who threw themselves over the castle walls to their deaths rather than surrender to Scott's troops.

Between the end of the war and 1853, when Santa Anna was invited back for what proved to be his final stint as president, revolts continued to prevent the central government from exercising control over the regional caciques. The 1854 Plan of Ayutla brought about the unification of liberal caciques against Santa Anna's government, which was backed by the conservative clergy and National Mexican Army. By the following year the broad-based insurgency had run Santa Anna out of office, cementing the hostilities that spawned the War of the Reform—the three-year civil war that pitted the conservatives against the liberal supporters of the constitution of 1857 (see Civil War and the French Intervention, ch. 1).

The civil war not only depleted the country's treasury reserves but also destroyed commerce and agriculture. In 1861 the liberal government of Benito Juárez found itself unable to pay the 28,000-man army that had helped bring it to power. The mounting unpaid foreign debts finally led to the French intervention of 1862. Although initially defeated at the bloody Battle of Puebla on May 5 of that year, the French, aided by Mexican conservative troops, eventually succeeded in installing the Habsburg archduke Ferdinand Maximilian Joseph as the second emperor of Mexico.

One of the strongest military leaders to emerge during the years of French intervention was General Porfirio Díaz, who commanded the army in the liberal stronghold of Oaxaca until it was captured by the French in early 1865. In addition to playing a decisive role in the liberal victories over the French at Puebla in 1862 and 1867, he managed slowly to parlay his military prowess into political strength. By 1867 Díaz, who had escaped his French captors, led the republican army and in March accepted the surrender of Mexico City, preparing the way for the return of the Juárez government. In one of the first attempts to exert civilian supremacy over the military, Juárez reduced the size of the 60,000- to 90,000-man republican army by two-thirds, an action that alienated Díaz, who assumed command over the dismissed troops and unsuccessfully challenged Juárez in the 1867 and 1871 presidential elections. The presidential succession after Juárez' death finally provoked Díaz to move against the government by issuing the 1876 Plan of Tuxtepec. Using recruits and funds gathered in the United States, Díaz defeated the government troops and in November of that year assumed the presidency, a position he would hold for all but four of the next 34 years (see The Restoration, ch. 1).

Although insurrections continued, Díaz was able to establish himself as the national cacique. His power was still based on military might as he ruthlessly eliminated those who challenged his authority. By mid-1877 the United States and Mexico came close to war over raids into United States territory by Mexican bandits and cattle rustlers. Díaz, however, was able to halt the brigandage and avert war by sending in federal army troops and the *rurales,* the feared paramilitary corps composed largely of criminals that also served as a counterweight to the regular military's power. The practice of forced conscription into the armed forces was continued, and a new method of preventing the ascendancy of military officers outside government control—the practice of rotating the command of the country's military zones—was instituted. In the mid-1880s state governorships were regularly offered to loyal officers as a reward for their obedience, while riots in Mexico City, denouncing the dictatorship's excesses, were brutally suppressed. By 1900 nearly one-fourth of the federal government's budget was spent on the military. As noted by one analyst, the guiding phrase of the Díaz regime was *pan o palo,* bread or the club (see The Porfiriato, ch. 1).

In the early 1900s liberal opposition to the dictatorship began to unify in presenting demands for social reform. The turning point for the Díaz government came in mid-1906, when 275 Arizona Rangers and a detachment of the *rurales* violently broke a strike at the Cananea copper mine, located in the northern state of Sonora and owned by a United States army colonel. In another strike the following year at the Río Blanco textile plant in Veracruz, more than 100 workers were gunned down by the *federales,* as the federal government troops were then known. In 1910 the William Howard Taft administration, angered by the growing influence of European industrial interests in Mexico, began to allow the growing opposition movement to use the United States as a base of operations. In the first formal act of the Revolution—the Plan of San Luis Potosí, issued from San Antonio, Texas, in October of that year—Francisco I. Madero declared himself provisional president and created the Army of Liberation that later became the Constitutional Army (see The Revolution, ch. 1).

By early the following year, regional caciques, some of whom were also described as bandits, had joined the movement. The rebels, led by Pascual Orozco and Francisco (Pancho) Villa and armed with Winchester rifles smuggled from the United States, quickly gained the advantage over the *federales*, who depended on long supply lines from the capital. After the resignation of Díaz in May 1911, the forces under the Army of Liberation were to be organized into a new military body known as the Rural Corps of the Federation, which would support the *federales*, who were still responsible for the defense of the central government. By mid-1911 Mexican regular troops were composed of some 16,000 *federales* and 12,000 former members of the Army of Liberation, of whom 6,000 were scheduled for dismissal.

The rebel military leaders, most notably Orozco, soon became dissatisfied with the token rewards offered them for their defeat of the dictatorship and began to organize uprisings throughout the country. Other revolutionaries, such as Emiliano Zapata in the state of Morelos, had never laid down their arms. However, the decisive military coup of February 1913 that ousted the Madero government and set the Revolution on its bloody course for the next four years, was led not by former rebels but by disaffected officers of the *federales*.

The Revolution (the military phase of which lasted from 1910 to 1917) provided the Mexican armed forces with a unifying ideology (see The Military Phase, ch. 1). It legitimized the military's popular origins and established its role as the defender of the popular will embodied in the Revolutionary government. As one analyst pointed out, "the ideology of the armed forces is in many ways the ideology of the political system since both had their origins in the Revolution, and both institutions are now integral parts of the Revolutionary mythology." Based on this ideology, the modern military institution identifies itself as the "silent and anonymous" guardian that has provided the security required for the harmonious development of the nation.

The first serious efforts at depoliticizing and professionalizing the military began in 1920 under the government of Álvaro Obregón, himself a general who had been elected president with the support of the old Revolutionary chiefs. Obregón realized that in order to consolidate his political position, it would be necessary to diminish the power and influence of the regional caudillos, who had played a crucial role in effecting the Revolution. At his request, military officers drafted in 1924 the first version of the 1926

Organic Law. Hundreds of Revolutionary generals were forced to retire; others died under mysterious circumstances.

The eight-year period of Mexican history known as the Maximato began in December 1924, when General Plutarco Elías Calles, who had been Obregón's secretary of war and navy, assumed the presidency. Although Calles served as constitutional president for only four years, he succeeded in continuing de facto rule for four additional years through his selection of the three subsequent presidents. Calles continued Obregón's initial efforts to wrest political control from the military. Only two military officers held cabinet posts between 1924 and 1928—those for war and navy and for foreign relations—as compared with five in the Obregón government. A series of laws were enacted that established a legal basis for the armed forces and regularized military practices (see Constitutional and Legal Basis, this ch.). The remaining Revolutionary officers—those who had not been purged by Obregón—were put on the government payroll. Disloyal generals continued to be retired, those of questionable loyalty were shifted away from their regional power bases, and the practice of regularly rotating the command of the country's military zones was continued. Although federal government expenditures on the armed forces were slashed, ample opportunities for self-enrichment were provided.

General Joaquín Amaro, Calle's secretary of war and navy, who later became the first director of military education, contributed the most toward the transformation of the Mexican military during this period. Amaro was instrumental in promoting education and training for the armed forces in the belief that loyalty and obedience to civilian authorities could be achieved by replacing caciques with institutions. Officers were sent abroad for professional military training in the United States and Western Europe. The curriculum of the Heroic Military College, founded in 1823, was completely revised. A new, second tier of military education was created in 1932 upon the opening of the Superior War College, which would serve as a command and general staff college for promising young officers. Various application schools, comparable to postgraduate service academies, were also established that same year to provide junior officers with intermediate levels of training in the specialized functions of their arms of service (see Education and Training, this ch.).

General Lázaro Cárdenas, also handpicked by Calles to be a candidate, chose to pursue his own independent policies upon assuming the presidency in 1934 but continued military professionalization efforts. The Secretariat of War and Navy was divided into two autonomous defense ministries (called secretariats)—the Secretariat of National Defense, which controls the army and the air force, and the Secretariat of the Navy. He also created a separate sector for the military within the ruling Party of the Mexican Revolution (Partido de la Revolución Mexicana—PRM), the predecessor of the Institutional Revolutionary Party (Partido Revolucionario Institucional—PRI) (see Institutional Revolutionary Party, ch. 4). As the possibility of Mexican involvement in World War II increased, Cárdenas drafted the Law of National Military Service in 1941, which established, through a lottery system, compulsory basic military training for 18-year-old males. In the final months of his administration, Cárdenas also prepared plans to eliminate the military sector from the PRM. The enactment of the Law of National Military Service and the dissolution of the military sector were formally carried out under his successor, General Manuel Ávila Camacho, who came to office in 1940.

Ávila Camacho was the last military officer elected president of Mexico. Civilian control of the political process was consolidated as the military became preoccupied with World War II and preparation for the defense of the nation. The Joint Mexican-United States Defense Commission was constituted in February 1942 and was assigned the official responsibility "to study the problems relating to the common defense of the United States and Mexico, to study broad plans for the defense of Mexico and adjacent areas of the United States, and to propose to the respective governments measures which, in its opinion, should be adopted." Although the commission, which continued to meet several times each year into the 1980s, failed to function as originally envisioned, it succeeded in bringing together for the first time United States and Mexican military officers and establishing a channel of communication between the two countries' armed forces.

The sinking of two Mexican commercial vessels in the Gulf of Mexico by German submarines provoked President Ávila Camacho to declare war on the Axis powers in June 1942. Under an agreement signed in June 1943, Mexican citizens were allowed to serve in the United States armed forces. At the height of the war effort, some 6,000 Mexican soldiers had been inducted into the United States Army. In January 1944 the Mexican Air Force was established under the Secretariat of National Defense, and plans were under way for a Mexican air squadron to be sent to the Pacific theater in response to the Mexican government's expressed desire to fight the Japanese.

After a year's training in the United States, Squadron 201 of the Mexican Expeditionary Air Force arrived in the Philippines in April 1945. Provided with uniforms, supplies, and 17 P-47 Thunderbolt fighters under the United States Lend-Lease Program, some 32 Mexican pilots participated in 50 combat missions between June 1 and July 10. The squadron's entire complement of 45 officers and 325 enlisted personnel was attached to the United States Fifth-Eighth Fighter Group stationed at Porac on the island of Luzon. Almost all of the operations were bombing and strafing runs made in support of ground forces. During the squadron's final 10 days of activity, the Mexican airmen also flew several long-range reconnaissance missions to Formosa. The total casualties were seven pilots, five of them killed during the final phase of the Formosa missions.

The immediate postwar years witnessed an increase in United States influence on the Mexican armed forces. During the final years of the Ávila Camacho administration, the organization of the Mexican military was restructured, using the United States armed forces as a model. United States Army field manuals were incorporated into the military training program. Before the modernization program of the late 1970s, the last major acquisitions of military hardware were made during this period.

In spite of greater influence from the United States, the Mexican government retained its aloofness and refused to enter into any military agreements that it felt might compromise its national sovereignty. Even under the conservative administration of President Miguel Alemán Valdés (1946–52), Mexico declined to participate in a United States defense pact that offered military assistance in exchange for Mexico's support in assuming certain defense responsibilities within the hemisphere. This strongly nationalistic policy, which is embodied in the twin pillars of nonintervention and self-determination in its foreign policy, has lent Mexico the distinction of having received less United States military aid than any other aid recipient in Latin America. The Mexican government received no grants of arms or equipment under the United States Military Assistance Program after 1950. Foreign Military Sales (FMS) credits for the purchase of United States military equipment and supplies were not provided to Mexico after 1968. Only on a reciprocal basis has Mexico agreed to limited participation in the United States International Military Education and Training (IMET) program. Under the International Security and Development Cooperation Program administered by the United States Department of State, some US$250,000 in IMET funds were requested for Mexico for fiscal year (FY—see Glossary) 1985. As one military analyst described the Mexican attitude toward foreign military aid: "They don't want to buy anything they can't pay for in cash."

National Security Concerns for Mexico

At various times during its first century of independence, Mexico was subjected to foreign attacks by the United States, France and, for a brief period, Spain and Britain. Mexican national security issues since 1910 have focused on the maintenance of domestic political stability, the avoidance of foreign economic domination, and the containment of social unrest. The last time Mexico was challenged by an immediate foreign threat was during World War II, when its proximity to the United States allowed it to fall under the protective shield of its northern neighbor. Except for a brief incident during the administration of President Adolfo López Mateos (1958–64), when Mexico almost went to war over an attack by the Guatemalan military on several Mexican vessels fishing in Guatemala's territorial waters, Mexico has maintained amicable, although often strained, relations with its southern neighbor. Bilateral relations with the United States were strongly affected by the bitter legacy left by the loss of more than one-half of Mexico's territory, incidents of United States involvement in Mexican domestic affairs, and past military action against Mexico, including General Winfield Scott's 1847 siege on the capital, the marines' 1914 occupation of Veracruz, and General John J. "Blackjack" Pershing's 1916 punitive expedition into northern Mexico. Most Mexican politicians who were affiliated with the ruling political party, the PRI, viewed United States domination, not communist aggression, as the major foreign threat to national sovereignty. Military officers, however, tended to hold less radical viewpoints and tended to perceive communism as a serious threat.

When challenges to internal order have arisen in the past, civilian authorities have customarily decided what constituted a threat and how best to confront it. In part because of the risk of political repercussions, military officers rarely acted unilaterally. Article 129 of the Constitution prohibits the involvement of the armed forces in functions not directly connected with military affairs (see Constitutional and Legal Basis, this ch.). There was debate, however, over the extent of individual initiative exercised within the officer corps. Some observers argued that the military had become an increasingly conservative force in wielding its political influence and repressing popular elements. Reports of heavy-handed methods employed by the armed forces dealing with challenges to internal order have repeatedly prompted criti-

ESCUELA MEDICO MILITAR

Headquarters of Secretariat of National Defense (above) and modern Military Medical School (below), both in Mexico City
Photos by Arturo Salinas

cism from human rights groups.

In September 1980 former secretary of national defense Galván López defined national security as "the maintenance of social, economic, and political equilibrium, guaranteed by the armed forces." In the 40 years following World War II, the primary mission of the military in maintaining this equilibrium was the preservation of domestic stability. According to David F. Ronfeldt, a consultant with the Rand Corporation and a recognized authority on Mexican national security issues, challenges to the political order in which military personnel have intervened at the request of civilian authorities fell into five basic categories: university strikes and protests, industrial and labor disputes, rural political disturbances, electoral disturbances, and outbreaks of guerrilla insurgency and urban terrorism. At the same time, military personnel have also participated in activities to improve socioeconomic conditions and in providing humanitarian assistance. Such civic action, especially in isolated rural areas that otherwise had little contact with government representatives, has been a key component in helping the military maintain domestic peace.

The threat of spreading conflict in Central America and the strategic importance attached to Mexico's southern oil fields were the two main factors motivating the reassessment of traditional policies on the security of the country's southern border. Efforts by Mexican military personnel in mid-1984 to relocate an estimated 50,000 Guatemalans living in refugee camps in southern Mexico near the Guatemalan border served as an indication that Mexican national security concerns were becoming outward looking. Not only were the new camps to provide the refugees with better facilities, but they were also located farther from the Guatemalan border. Reported incursions of Guatemalan guerrillas into Mexican territory and forays carried out by the Guatemalan Army in hot pursuit increased concern. Nevertheless, of an estimated 120,000 Guatemalans who had sought refuge in Mexico by mid-1984, only about one-half were living in refugee camps. In response to this changing situation, additional Mexican military personnel were assigned to the area. In 1983 a new military zone was created in Chiapas, the second in the state, with headquarters in Tapachula, only a dozen kilometers from the Guatemalan border. Believing that Chiapas, one of Mexico's poorest states, could be a potential problem, the federal government after early 1983 dedicated funds to improve socioeconomic conditions there, including plans to build roads, provide peasant farmers with better quality seed, and other infrastructure development projects.

Since the late 1950s, Mexican geopoliticians have recognized the strategic importance of controlling the area surrounding the Isthmus of Tehuantepec, which includes the states of Veracruz and Tabasco on the Gulf of Mexico and Oaxaca and Chiapas on the Pacific. One even went so far as to suggest that the Mexican capital should be moved there. The development of the country's petroleum reserves, which are concentrated in that region, accentuated the need for protection. By 1984 the Mexican Petroleum Company (Petróleos Mexicanos—PEMEX), the state-owned oil company, had expanded its decisionmaking process to include input from the armed forces. In areas where new oil fields were being developed, military authorities were consulted about the best means to make the installations compatible with security objectives. Because the Mexican armed forces were responsible for protecting the country's oil fields, much effort was made in the late 1970s and early 1980s to improve their capabilities to defend the fields and installations against a possible terrorist assault or an external attack.

Efforts were also made to increase patrols of the country's coastline and its territorial waters. The significant growth in the portion of the Mexican defense budget dedicated to the Secretariat of the Navy in the early 1980s showed the changing priorities. Between 1980 and 1984 the United States and Mexico were at odds over the Mexican navy's apprehending of United States fishing vessels—mainly tuna boats—within the country's Exclusive Economic Zone, which extends some 200 nautical miles from shore. Along with protection of its fisheries and detention of vessels transporting contraband through Mexican waters, the navy was also charged with the defense of offshore oil installations and other oceanic resources.

Until the 1970s the nonstrategic nature of Mexican defense interests had allowed the Mexican government to rely largely on the United States for protection. By the later years of that decade, however, heightened nationalism regarding the considerable economic benefits to be derived from developing the country's natural resources led Mexico to improve its ability to defend them. Not only had Mexico achieved new international importance during this period, but also the perception of what was required to guarantee national security had changed. As a 1982 report from the Secretariat of National Defense stated, "in a situation of accelerated changes, of rapid modernization, and in a climate of tensions and disputes . . . to speak of the modernization of Mexico is to speak of the modernization of the armed forces."

Mexico as a Security Concern for the United States

Mexico has been important to United States national security for two principal reasons: its proximity and its natural resources. As Edwin A. Deagle, Jr., the director of international relations at the Rockefeller Foundation, has acknowledged, Mexico's "vast reserves of oil, and the fact that it is close to the United States and outside OPEC . . . [are] matter[s] of enormous strategic significance to both the United States and its allies." Another scholar, Bruce D. Porter, who has studied United States-Soviet relations in terms of conflicts in the Third World, argued that Mexico is one of "the most clear-cut examples of Third World regimes critical to U.S. security." If Mexico were "threatened by anti-American forces," he pointed out, "the United States would probably have little choice but to attempt to prevent its collapse by the use of armed force."

According to Dr. John Child, an authority on United States strategic planning in Latin America, the importance of Mexico to United States strategic interests was recognized as long ago as 1919. The "General Mexican War Plan," the first of a series of United States contingency plans for Mexico, included the goals of sealing the United States border, seizing the Mexican oil fields in Tampico and coal fields just south of Texas, blockading the principal Mexican seaports, and cutting off the Mexican railroad system near the Guatemalan border. Between 1920 and 1940 modified "color plans" were developed for each country in the Western Hemisphere. The "Green Plan" for Mexico was the most developed and featured many of the same objectives of the previous plan. The World War II "Rainbow Plans" incorporated both a cooperative and an interventionist approach for Mexico. As pointed out by Child, "even while Mexican-U.S. military cooperation was at its closest during World War II, U.S. military planners were still preparing for possible unilateral contingencies."

A dominant United States security concern for Mexico during mid-1984 centered on the belief that the Central American conflict, if not checked, would spread into Mexico, thus endangering United States access to Mexican oil supplies and triggering a flood of refugees into this country (see Relations with the United States, ch. 4). One Mexican political scientist echoed the commonly perceived reservations of the de la Madrid administration concerning this belief: "All the pronouncements . . . with regard to the so-called domino theory or to predictions of revolution in Mexico are by far a stronger destabilizing force than any potential contagion arising from. . . revolution in Central America." Another United States concern for Mexican security at the time arose from the fragile state of Mexico's economy, social dislocations brought about by harsh economic realities, and a changing political scene that, it was feared, would lead to violent domestic disorders.

Speaking perhaps to both these concerns, General Paul F. Gorman, the commander in chief of the United States Southern Command in Panama, told the Senate Armed Services Committee in early 1984 that Mexico could be the "number one security problem" for the United States over the next decade. Although Department of State spokesmen later qualified the general's remarks by saying that they reflected his "personal views," an aide to the officer indicated that his superior's statement did coincide with the assessments of some United States intelligence officials. Whatever the changing nature of relations between the United States and Mexico, however, the latter will remain a national security concern for the former. As aptly stated by the United States ambassador to Mexico, John Gavin, in 1983, the United States-Mexican relationship "is a marriage without possibility of divorce."

Treaty Obligations

Mexico is a signatory to all principal defense-related multilateral treaties and agreements in the Western Hemisphere. In early 1945 Mexico signed the Act of Chapultepec along with 19 other nations of the hemisphere. Under the act, the first hemispheric defense agreement, signatory nations agreed that if any aggression across treaty-established boundaries occurred or was threatened, a meeting would be convened to determine what measures, up to and including the use of armed force, should be implemented to prevent or repel such aggression.

The Inter-American Treaty of Reciprocal Assistance, also known as the Rio Treaty, was signed by Mexico in September 1947. The Rio Treaty, which expanded the responsibilities of nations under the Act of Chapultepec, emphasized the peaceful settlement of disputes among Western Hemisphere nations and provided for collective defense should any signatory be subject to external aggression. According to one authority, upon signing the treaty, Mexico implemented for the first time its twin foreign policy principles of self-determination and nonintervention. Although the treaty was conceived as a means to protect the nations of the hemisphere from possible communist aggression, Mexico chose to interpret the pact as a juridical association of states, not as a military alliance. In each of the 16 times that the treaty was invoked between December 1948 and 1984, Mexico voted against the adoption of collective security measures (see Foreign Relations, ch. 4).

Upon the formation of the Organization of American States (OAS) in April 1948, Mexico actively opposed proposals to create a standing military force under OAS supervision. Although Mexico did finally accede to the demands of the majority, it managed to limit the role of the newly created body—now known as the Inter-American Defense Board—to serving only in a consultative capacity to OAS member nations. The defense obligations of member nations under the Charter of the OAS encompass those of the Rio Treaty; subsequent amendments to the charter have underscored the goal of peaceful resolution of disputes among member states.

Mexico initially proposed, then became a signatory to, the 1967 Tlatelolco Treaty, which prohibits the introduction of nuclear weapons into Latin America, and to the 1968 Nuclear Non-Proliferation Treaty, which limits the application of nuclear technology to peaceful purposes. Mexico has accepted the safeguards agreements of the International Atomic Energy Agency, which include the accounting and control of nuclear reactor by-products that could be used to make weapons, but has refused to permit on-site inspections of its nuclear facilities.

Administration, Organization, and Training

The organization of the Mexican armed forces at the cabinet level is distinct from that of many other Latin American nations. Instead of a single ministry consolidating the command of the army, navy, and air force, two government ministries are directly responsible for national defense: the Secretariat of National Defense and the Secretariat of the Navy. The head of each of these secretariats is a military officer who holds cabinet rank and reportedly has regular, direct access to the president of the republic, who is the supreme commander of the armed forces (see fig. 13).

Estimates of manpower placed the size of the Mexican armed forces at between 120,000 and 125,000 active-duty personnel in 1984. This represented almost a 100-percent increase since the mid-1960s. Plans set under way before the economic crisis of 1982 originally called for the armed forces to grow to 220,000 by 1986. Because of the country's economic troubles, however, it appeared likely in 1984 that the military would increase its manpower to between only 140,000 and 145,000 by the early 1990s. It was also likely that the difficult economic situation would result in smaller increases in Mexican government defense expenditures (see fig. 14).

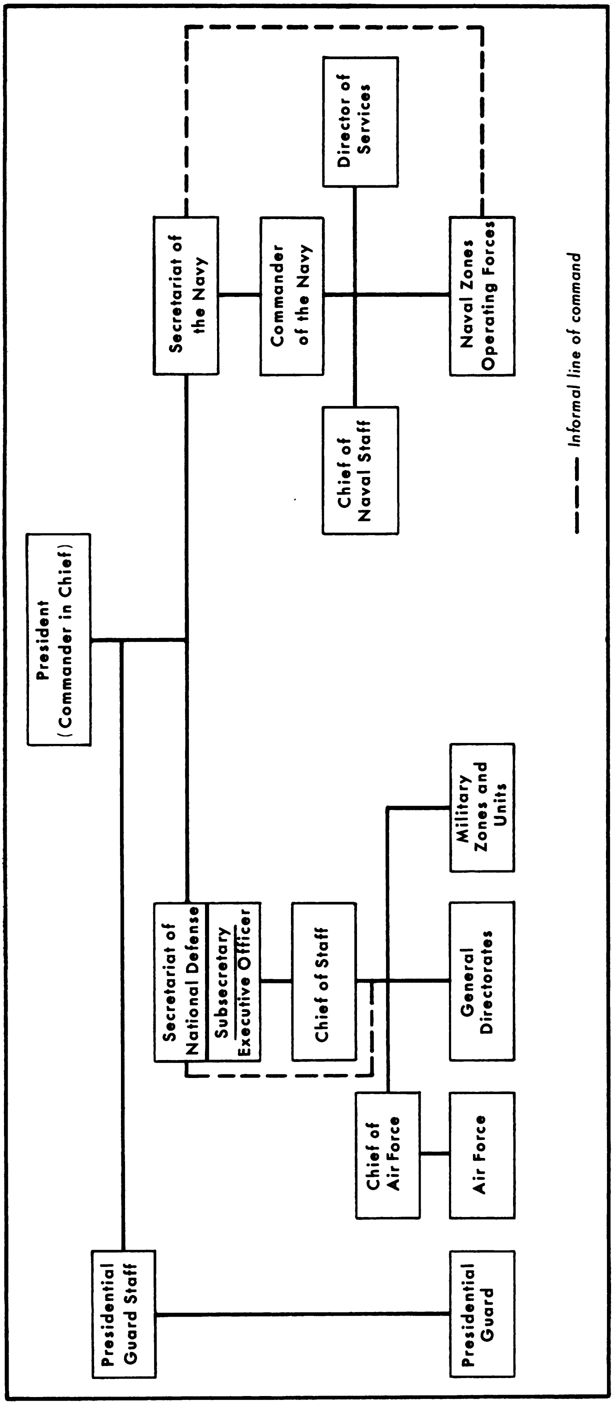

President (Commander in Chief)
Presidential Guard Staff
Presidential Guard
Secretariat of National Defense
Subsecretary
Executive Officer
Chief of Staff
Chief of Air Force
Air Force
General Directorates
Military Zones and Units
Secretariat of the Navy
Commander of the Navy
Chief of Naval Staff
Director of Services
Naval Zones Operating Forces
Informal line of command

Figure 13. Command Structure of the Mexican Armed Forces, 1984

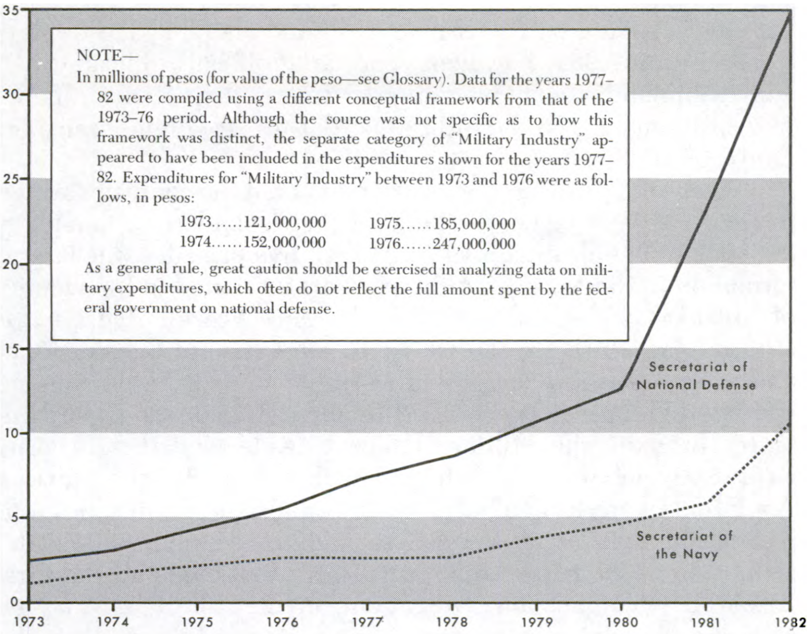
The active-duty armed forces were complemented by approximately 250,000 conscripts who underwent basic military training annually. In addition, a Rural Defense Corps of approximately 120,000 volunteers augmented the military presence in the Mexican countryside. Estimates published by the United States Central Intelligence Agency indicated that the total number of service-eligible Mexican males between the ages of 15 and 49 was over 14 million by 1983. Each year an additional 860,000 male youths turn 18, the age at which military training under the Law of National Military Service is required.

Secretariat of National Defense

The army and air force operate jointly under the command of the Secretariat of National Defense. The army was the dominant service in the Mexican armed forces, staffed with between 92,500 and 94,500 active-duty personnel, approximately 75 percent of the total Mexican military strength, in early 1984. According to Major Steven J. Wager, in his chapter on the Mexican military in *The Latin American Military Institution*, the army received a commensurate portion of the defense budget. The Mexican Air Force, whose personnel numbered between 5,000 and 5,500, represented roughly 6 percent of Mexican military manpower in 1984.

The secretary of national defense has always been and, given no unforeseen circumstances, will continue to be an army officer. The last three secretaries have been graduates of the Superior War College. Those under both López Portillo and de la Madrid were cavalry officers. In addition to their records of distinction in military service, all three had close personal ties to the president. Under the de la Madrid administration, the secretary of national defense was General Juan Arévalo Gardoqui, the former commander of the First Military Zone and according to some, a relative of President de la Madrid's wife.

In 1984 Mexico was divided into nine military regions with 36 military zones. Zone boundaries usually corresponded with those of the country's 31 states. The commanding headquarters of a military zone was almost always located in the state capital. The states of Veracruz, Guerrero, and Chiapas each had two military zones. Prior to the creation in 1983 of the Thirty-sixth Military Zone in Tapachula, Chiapas, the most recent new military zone had been created in 1967 in Chilpancingo, Guerrero, in response to increased guerrilla activities (see Threats to Internal Security, this ch.). The Federal District (the location of Mexico City) was the seat of the First Military Zone, which served also as headquar-



NOTE—
In millions of pesos (for value of the peso—see Glossary). Data for the years 1977–82 were compiled using a different conceptual framework from that of the 1973–76 period. Although the source was not specific as to how this framework was distinct, the separate category of "Military Industry" appeared to have been included in the expenditures shown for the years 1977–82. Expenditures for "Military Industry" between 1973 and 1976 were as follows, in pesos:

1973......121,000,000	1975......185,000,000
1974......152,000,000	1976......247,000,000

As a general rule, great caution should be exercised in analyzing data on military expenditures, which often do not reflect the full amount spent by the federal government on national defense.

Source: Based on information from Miguel de la Madrid, *Primer informe de gobierno, 1983: sector gobierno,* Mexico City, September 1983, 225.

Figure 14. Administrative Summary of Defense Expenditures, 1973–82.

ters for the First Military Region.

Military zone commanders were appointed by the president, usually on the recommendation of the secretary of national defense. The senior zone commander in a given area also acted as the commander of the military region in which his zone fell. Zone commanders held jurisdiction over all units operating in their territory, including the Rural Defense Corps. Occasionally, they were also used by federal authorities as a political counterweight to the power wielded by state governors (see The Government, ch. 4). In the event of a grave political crisis within a state, a military zone commander may take over the governor's office until a replacement is named by the president. Zone commanders provided the secretary of national defense with valuable intelligence regarding social and political conditions in rural areas and traditionally have acted in close coordination with the Secretariat of

National Defense on the issue of resource planning and deployment. In mid-1984, however, secretariat officials indicated that zone commanders may be granted a greater degree of autonomy in decisionmaking in the future in order to "streamline transport [and] communications."

According to Wager, some 40 percent of the country's armed forces were deployed in the Federal District and in the neighboring state of Puebla in late 1983. At least five brigades, the largest formation in the Mexican military, were stationed in the vicinity of Mexico City. These included the elite Presidential Guards Brigade, which reported directly to the Office of the President and was responsible for providing military security for him and visiting dignitaries. The Second Infantry Brigade, the Third Infantry Brigade, the Military Police Brigade, and the Airborne Brigade, which was under the nominal command of the Mexican Air Force, were formed after 1970 from existing units. If the financial crisis eases after 1984, an additional armored brigade, formed from the First Armored Infantry Battalion and the First Armored Reconnaissance Regiment (created in 1982), may be stationed at an installation being constructed in Temamatla in the state of México. At least two press reports also indicated that a new 4,000-man quick reaction force—the existence of which was denied by some—was being trained in 1982 "to act against a professional army in a regular war, and to operate in irregular guerrilla warfare." Personnel belonging to the force were to be stationed at air bases throughout the country and were expected to have the capacity "to be at the oil fields within three hours."

Of the existing 71 infantry battalions in early 1984, 65 were scattered throughout the country's military zones as independent garrison battalions. Most military zones were assigned at least two infantry battalions composed of approximately 300 troops each; some also were assigned an additional motorized cavalry regiment or one of the army's three artillery regiments. All but one of the 28 cavalry regiments were being motorized, beginning in the López Portillo administration, as part of the modernization program. The remaining regiment—reportedly stationed at Saravia, Guanajuato—was to be retained to "conserve the spirit and tradition" of the cavalry, according to former secretary of national defense Galván López. Army engineers, the fourth arm of Mexican ground personnel, as well as antiaircraft and combat support and service units, were also organized at the regimental, battalion, and company levels and were stationed at military zone installations.

Under the modernization program initiated in the late 1970s, the Mexican army received significant amounts of new equipment and focused on the development of its domestic defense industry. Under the coordination of the General Directorate of Military Industry, Mexico henceforth produced its own uniforms, related supplies, and small arms and munitions. Efforts were also directed at improving the military's self-sufficiency, thereby lessening its costly dependence (in terms of foreign exchange reserves) on other countries. By 1984, however, the country by no means had reached the stage in development of its military industry in which the quality of its output could compare with such other Latin American producers of defense-related matériel as Brazil or Argentina.

Under a coproduction agreement with the Federal Republic of Germany (West Germany), the Mexican defense industry began mass-producing G3 automatic rifles in the early 1980s. At the same time, the state-owned Dina Nacional truck factory began manufacturing for military use three-quarter-ton trucks and the DN-III armored car. In 1983 one report noted that plans were under consideration for upgrading the DN-III to a light tank. Mexico also attempted to develop short-range three- to 12-kilometer surface-to-surface rockets that were first displayed at the Independence Day parade in 1981 but reportedly has had trouble perfecting the rockets' propellant. There was also speculation before the 1982 economic crisis that Mexico might enter into an agreement with Argentina for the coproduction of the TAM main battle tank.

During the López Portillo administration emphasis was also placed on scientific and technological developments having possible military applications. One study, published in 1983, maintained that fully one-third of the funds allocated to the Mexican industrial sector between 1978 and 1982 were for projects "directly related to military uses." Industries participating in these developmental efforts reportedly included "the chemical industry, telecommunications, transport, ferrous and nonferrous metallurgy, electronics, the engineering and automobile industries, and instruments and technological inventions." The implementation of a telecommunications network, using telex equipment, linking all military zones and the headquarters of the Secretariat of National Defense in Mexico City was accomplished during 1982. Wager pointed out two years later that computers were "just beginning to play a constructive role within the Mexican defense establishment."

New foreign acquisitions of defense-related matériel destined for the army included the purchase from France in 1982 of some 40 Panhard ERC-90 Lynx armored vehicles. In mid-1984

Mexico was one of France's first foreign customers for Panhard VBL light armored cars upon the delivery in early 1985 of the first vehicles out of a total purchase of 40. One report published in August 1984 noted that the Mexican government had ordered between 40 and 50 Ultrav light armored vehicles, also manufactured by Panhard. Some of the French-manufactured vehicles were expected to be armed with MILAN antitank weapons. Some 35 West German-manufactured HWK-11 armored personnel carriers ordered in 1981 also were delivered in 1982. That same year the Mexican army expressed an interest in acquiring UH-60 Black Hawk helicopters and an air radar defense system from the United States, but no purchase had been made as of mid-1984. At that time plans for major purchases had been scaled back because of the country's economic difficulties.

The Mexican Air Force also benefited substantially from the modernization program in terms of acquisitions of equipment and improvements to facilities. The air force personnel complement, however, decreased from an estimated 6,000 in 1974 to between 5,000 and 5,500 in mid-1984, giving it about the same manpower as during the mid-1960s. The air force was headquartered at the Secretariat of National Defense in Mexico City and, similar to the army, its personnel were stationed at bases throughout Mexico. Its principal air base, Military Air Base Number 1, was located at Santa Lucía in the state of México, a short distance from the Federal District. Other air bases included installations at Acapulco, Ciudad Ixtepec, Cozumel, Ensenada, Mérida, and Zapopán.

The highlight of the air force modernization program was the 1982 delivery of 10 F-5E Tiger II supersonic fighters and two F-5F two-seater trainers. This purchase represented the first acquisition by Mexico of combat aircraft in 20 years and provided the country with the only supersonic fighter aircraft—except for Cuba's—between the United States and Panama. As a result of the purchase, an air defense squadron was created in 1982. Facilities at the Santa Lucía air base, where the jets were hangered, were renovated, and as part of a construction agreement with the United States, the base's runways were lengthened to accommodate the aircrafts' requirements. There was some speculation that money for the original purchase, some US$130 million including training and support equipment, may have come from a special discretionary fund controlled by the Mexican president. If true, the full purchase price of the jets was not reflected in official defense budget figures.

Other acquisitions by the air force during 1982 included some 55 Swiss Pilatus PC-7s, to be used both for training and for counterinsurgency missions; five United States-built Boeing 727 100s for transport; and 20 Mudry CAP-10B airplanes for primary training. According to one observer, the air force also ordered during 1983 a number of transport planes from Spain and had expressed an interest in purchasing another dozen F-5s from the United States. Prior to the 1982 economic crisis, the air force was planning the coproduction of EMB-326 Xavante counterinsurgency aircraft and EMB-110 Bandeirante transports—using technical assistance from the Brazilian Aeronautics Company (Empresa Brasileira de Aeronáutica—Embraer)—as well as Israel Aircraft Industries' 201 Arava trainers.

The balance of the air force fleet was made up of United States-built T-33 fighter-bombers used for counterinsurgency and training; helicopters used for search and rescue missions, including United States-manufactured Bell helicopters and French-manufactured Alouettes; heavy and light transport planes, composed mainly of purchases from the United States; plus other craft of primarily United States origin used for photo reconnaissance missions and training. The Presidential Transport Squadron based at the Benito Juárez International Airport in Mexico City was equipped with Boeing transports, Puma helicopters, and several small jets.

The Rural Defense Corps, composed entirely of volunteers, augmented the military presence in the countryside. The corps was formally organized under army jurisdiction according to the Organic Law of 1926. Its origins, however, dated back to the period when the Revolutionary agrarian reform program was first implemented in 1915 (see The Rural Society, ch. 2; Land Tenure, ch. 3). In efforts to protect themselves against the white guards, as the private armies of recalcitrant large landowners were called, rural peasants organized themselves into small defense units and were provided weapons by the Revolutionary government. During the Cristero Rebellion of the mid-1920s, these same peasant-based defense bodies supported the constitutional government (see The Constructive Phase, ch. 1). Until 1955 enlistment in the Rural Defense Corps was restricted to *ejidatarios* (peasants working *ejidos*—see Glossary). Afterward, participation was expanded to include small farmers and laborers. All defense units, however, were attached to *ejidos*, possibly as a means to guarantee control.

In the mid-1970s the corps was composed of some 80,000 mounted and 40,000 infantry members who enlisted for a three-year term of service. The volunteers did not wear uniforms or receive pay for their service but were eligible for limited benefits. Corps members were organized into 11-man platoons and were provided only rudimentary training by troops assigned to military zone detachments. Traditionally, they were armed only with old rifles and machetes.

Corps volunteers were under the immediate command of military zone officers but also were responsible to the local *ejido* government. On rare occasions the units were authorized to act on their own initiative under the elected leadership of one of the unit's members. The principal asset of the corps to military authorities was in the capacity of its members to pass on valuable intelligence about activities within the *ejidos* and in remote rural areas seldom patrolled by military zone detachments. Corpsmen also acted as guides for detachment patrols and participated with zone personnel in school restoration projects and, sometimes, in operations directed against cattle rustlers and drug traffickers.

Such civic action designed to improve socioeconomic conditions and enhance public welfare became an important component of the army's successful maintenance of internal order. As incorporated in the Organic Law, the army and air force were assigned the responsibility to "aid the civilian population, cooperate with authorities in cases of public necessity, [and] lend assistance in social programs." Programs designed to meet these aims expanded considerably following their inception in the 1960s.

By 1982 these efforts encompassed a wide range of activities carried out by military zone personnel, often in coordination with government agencies, which served to reinforce the army's ties to the country's rural inhabitants and promote national development. Among these many programs were included disaster relief efforts (referred to under the rubric of Plan DN-III-E), a campaign to eliminate malaria, reforestation programs, and drug eradication efforts (see Threats to Internal Security, this ch.). In addition, military zone personnel regularly provided assistance to the rural population through their participation in literacy and adult basic education programs, immunization programs, the provision of potable water to remote areas, and rural community development programs, including school restoration projects and the construction of roads and sanitary facilities.

Military personnel also served as escorts on the national railroad, patrolled federal highways on national holidays, and participated in campaigns to eliminate livestock disease and crop damage caused by insect infestations. By 1983 contingency plans—in coordination with the Secretariat of the Navy—were also being developed to control spills of oil or other noxious substances. Additional areas of responsibility introduced in the early 1980s included the provision of security for the transport of radioactive materials

The Panhard ERC-90 Lynx, one of a number of armored vehicles by this French manufacturer in Mexico's inventory
Courtesy Panhard

and the development of plans, in conjunction with Teléfonos de México, the state-run telephone company, and the Protection and Transit Secretariat, the principal Mexico City police force, to guarantee the security of the country's telecommunications system.

Secretariat of the Navy

The number of personnel under the Secretariat of the Navy grew considerably between the mid-1970s and 1984 as a result of its broadened responsibilities. Although in 1976 the navy's active-duty military personnel numbered about 16,000, some estimates in 1984 placed the size of naval forces—which included the regular navy, naval aviation, and the marines—as high as 27,000. In 1983 the London-based International Institute for Strategic Studies estimated the size of Mexican naval forces at 20,000. Of these, it noted 300 personnel assigned to naval aviation and another 4,500 to the marines. In light of other available data, however, this latter estimate appeared too low. Also falling under the command of the Secretariat of the Navy were members of the coast guard and the merchant marine, who supported the country's growing maritime industry.

Similar to the army and air force, active-duty military personnel attached to the Secretariat of the Navy were dispersed throughout the country at various naval zone, air base, and port installations. The country was divided into 17 naval zones, one for each coastal state; six were located on the Gulf of Mexico and 11 on the Pacific coast. Naval aviation also had personnel located at five naval air stations, including the naval aviation academy. Marine personnel, divided into 30 security companies, acted as guards for zone installations and participated in some inland river patrols. An offshore naval air base, the first of its kind for Mexico, was also reported as being under construction in 1983 in the Islas de Revillagigedo, some 350 nautical miles off the Pacific coast from Manzanillo.

In mid-1984 the Secretariat of the Navy was under the command of Admiral Miguel Angel Gómez Ortega, the former chief of naval operations under the López Portillo administration. The secretary of the navy, like his counterpart in the Secretariat of National Defense, was appointed by the president. Again, as with the secretary of national defense, appointment of a secretary of the navy depended not only on a distinguished professional career but also on the existence of a personal relationship between the secretary and the president. Naval zone commanders were also appointed by the president, usually on the recommendation of the secretary of the navy. Although the general headquarters of the Secretariat of the Navy was located in Mexico City, the commanding headquarters for the naval zones was divided between the country's two coasts. The commanding headquarters of the Pacific fleet was in Mazatlán; the Gulf coast command was in Veracruz. Through coordination with each coast's command, operations were carried out by the respective naval zones in patrolling the country's approximately 9,300 kilometers of coastline and nearly 3 million square kilometers of waters considered part of Mexico 's territorial sea and Exclusive Economic Zone.

Between 1980 and 1984 the Mexican navy benefited substantially from the modernization program not only in terms of increased personnel but also in terms of the acquisition of new vessels and other equipment. Considerable funds were also directed toward the construction of new ports, the renovation of existing facilities, and the development of Mexican shipbuilding yards and dry docks for repairs and maintenance. An indication of the newly attached importance to the protection of maritime resources and the defense of national waters was the announcement by Gómez Ortega shortly after his appointment of plans to renew "fully half" the existing fleet. The secretary of the navy also reportedly signaled his intentions to double the number of patrol boats, most of which were built domestically, and to purchase new vessels with greater endurance. According to data published by the Mexican government, navy budget allocations increased by nearly 4 billion pesos (for value of the Mexican peso—see Glossary) between 1982 and 1983. One analyst pointed out that by 1983 the Secretariat of the Navy was receiving more than 25 percent of total government defense expenditures, whereas its manpower constituted only about 19 percent of the armed forces.

Acquisitions during the early 1980s included purchases made from the United States, Spain, and Britain. In early 1982 two World War II-vintage Gearing-class destroyers were transferred to Mexico by the United States, complementing the country's two other United States Fletcher-class destroyers transferred in 1970. Between 1982 and 1983 Mexico received from Spain six new 1,141-ton Halcón-class frigates, three of which were commissioned in 1983. Four Águila-class fishery protection vessels were also being built in Mexico in 1983, the first of which was commissioned in November of that year at Tampico. Plans were under way in 1984 to build at least five more of the Águila-class patrol craft—which were similar in design to the Halcón-class vessels, though slightly smaller—at Mexican shipyards in Tampico on the Gulf and Salina Cruz on the Pacific. Some 31 Azteca-class 31-meter patrol boats, used mainly for fishery protection, were also in service in 1983. Although the first 21 boats were constructed in Britain, the remaining 10 were built in Mexico. Spending plans for 1984 included the construction of at least nine more, even though they had reportedly proved disappointing in service. Also under construction in Mexican shipyards in 1983 were three Olmeca-class small patrol boats, used mainly for river patrols, and two transport ships. In 1983 former United States vessels in service with the Mexican fleet included several modified destroyer escorts, numerous minesweepers, at least one modified tank landing ship, and an oceanographic research ship with which Mexico was reportedly dissatisfied. A Spanish-built sail training ship, the *Cuauhtémoc*, also complemented the Mexican fleet and, as part of a training program for naval cadets, sailed to ports as far away as Japan in 1983.

Two domestically built Tonatiuh naval aircraft were also in the inventory of naval aviation, along with eight to 10 Grumman HU-16 Albatross amphibious aircraft, about eight French-manufactured Alouette IIs and IIIs, and five West German BO-105 light helicopters, among a total of some 60 aircraft. Marine companies also received an estimated seven Pegaso VAP amphibious vehicles under a 1981 purchase agreement with Spain. Their usefulness was questionable, however; one analyst characterized the Pegasos as not much more than "little boxes on wheels."

The primary mission of the Secretariat of the Navy, as assigned by the de la Madrid administration's National Development Plan (1983–88), was to "protect strategic installations and natural resources." Also entailed in this mission was the responsibility to "defend and promote" the development of maritime resources lying within the country's 200-nautical mile Exclusive Economic Zone. In operations carried out between 1982 and 1984, this assignment translated into safeguarding the country's strategic oil installations (both at port facilities and offshore), apprehending foreign vessels fishing within the Exclusive Economic Zone without permits issued by the Mexican government, and interdicting shipments of contraband—including drugs and weapons—passing through Mexican territorial waters.

As with personnel assigned to the Secretariat of National Defense, personnel under the Secretariat of the Navy also participated in disaster relief efforts to aid the civilian population and in clean-up efforts to prevent environmental damage resulting from spills of oil and other toxic substances. The navy also participated in efforts to relocate Guatemalan refugees from camps in Chiapas to Campeche by way of the Río Usumacinta, beginning in May 1984. Other programs supervised by the Secretariat of the Navy were the dredging of port facilities, the repairing and maintaining of vessels assigned to the navy's fleet and the maritime industry, and the conducting of oceanographic research. Between January and August 1983 the navy prepared some 14 oceanographic studies, which included the publication of nautical charts, the analysis of the impact on the ecosystem of varying pollution levels along the Mexican coastline, and an inventory of the nation's maritime resources.

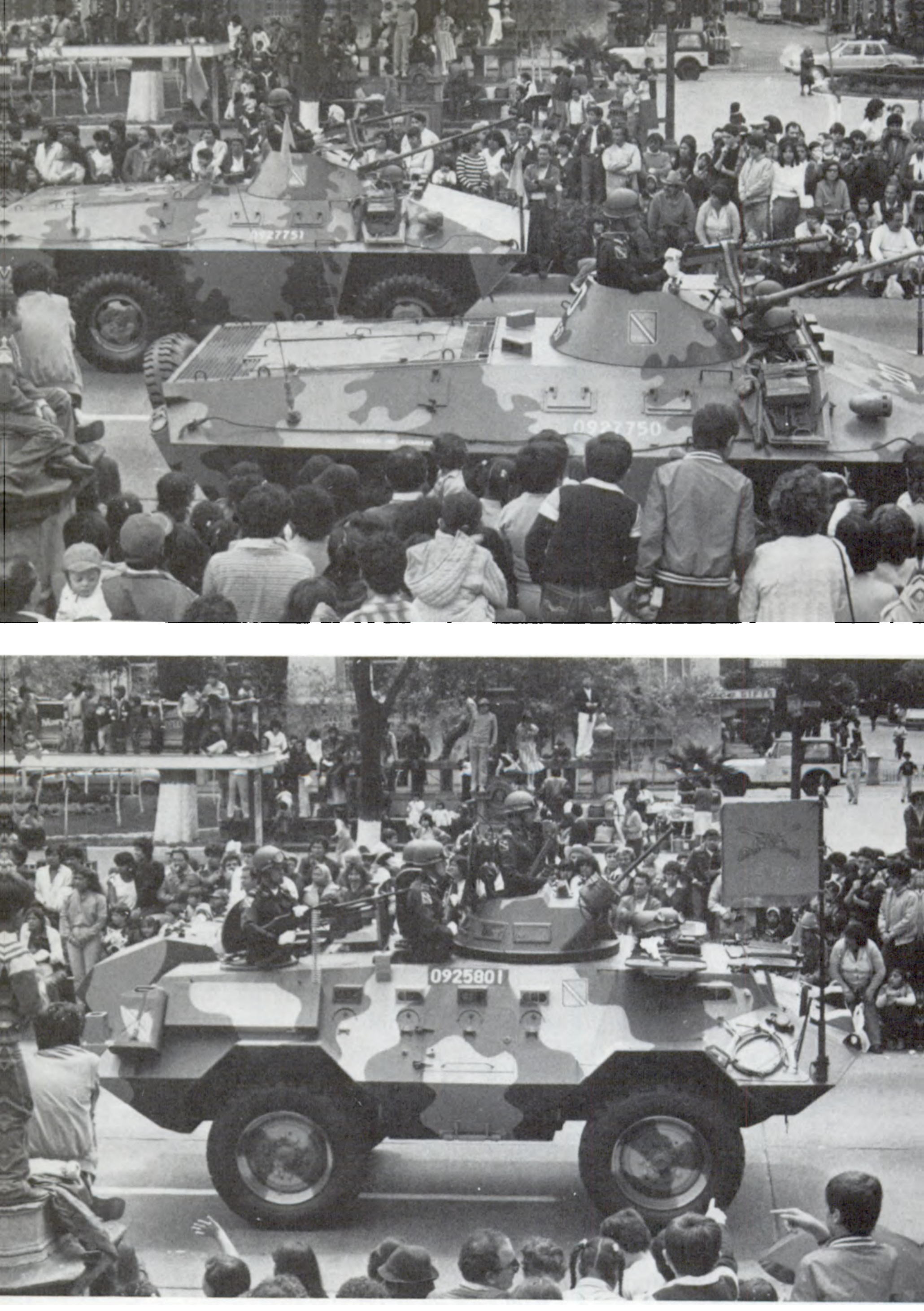
Other Sources of Defense-Related Equipment

Other nonmilitary governmental bodies also held equipment that, in time of emergency, could be used to support national defense. Among these organizations were the various government secretariats, state agencies, police forces, and state governments. By late 1981 the Mexican Social Security Institute, which provides government-subsidized health care to the country's inhabitants, had assembled a fleet of seven EMB-110 P-1 Bandeirantes aircraft manufactured by Embraer of Brazil (see

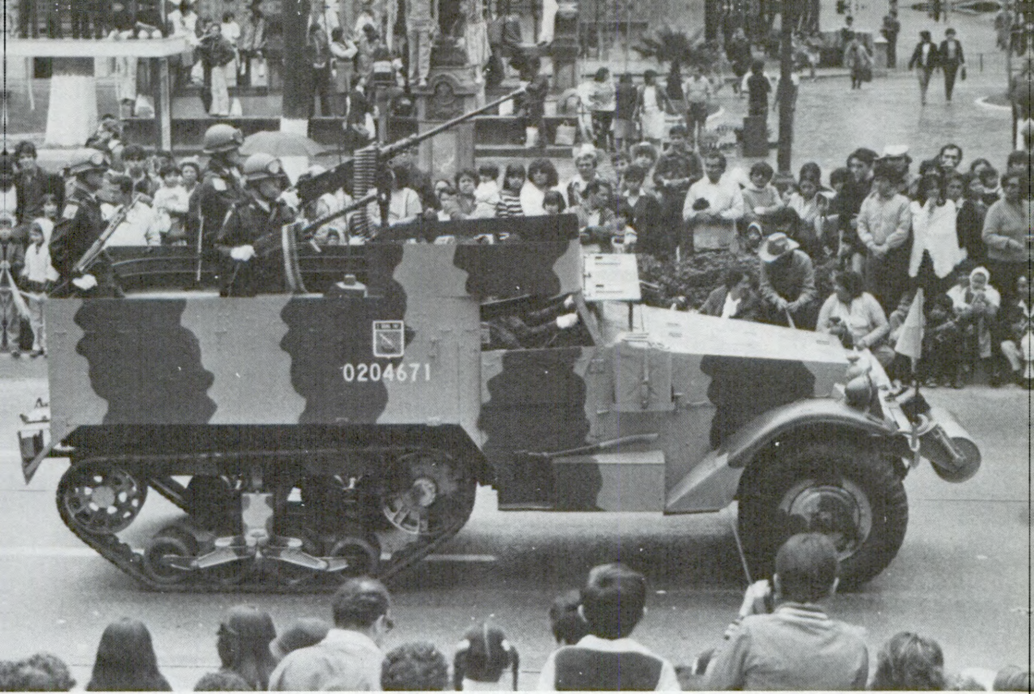
Health and Welfare, ch. 2). Each Bandeirante, which is capable of landing on unpaved runways, had been modified to hold 12 beds and up to three medical attendants. At that time the airplanes supporting the air ambulance service, which had been initiated in 1979, were based at airports in Monterrey, Nuevo León; Guadalajara, Jalisco; and Mérida, Yucatán.

PEMEX, the state-run oil monopoly, also had a sizable air fleet that included some 27 fixed-wing aircraft, including one heavy transport, and numerous helicopters in late 1981. Company-employed, uniformed pilots regularly transported personnel, equipment, and supplies throughout Mexico and to offshore drilling platforms and assisted in petroleum exploration. By the end of the López Portillo administration, PEMEX's Hercules L–100–30 heavy transport airplane, the commercial version of the C-130 military transport, had already been used to support activities not directly related to oil production. The L–100–30 reportedly accompanied the entourage of President López Portillo on his state visit to India and was used during the 1981 North-South Conference in Cancún to transport heavy equipment to the airport there. During a national emergency this plane could be used to transport up to 96 infantry or 64 airborne troops or could be modified into an air ambulance accommodating 174 beds and two attendants. The heavy transport is also capable of landing on unpaved runways—even on sand or gravel. In 1984 PEMEX, in conjunction with the Secretariat of Communications and Transport, installed a maritime radar detection system that provided for marine traffic control and surveillance of the nation's waters.

The Office of the Attorney General also had at its disposal advanced equipment with possible military applications. One published report noted that in 1983 the attorney general's air wing, whose prime responsibilities were the detection and eradication of opium poppy and marijuana fields, consisted of some 67 aircraft, including 13 Bell 212 and 33 Bell 206 helicopters and, as fixed-wing aircraft, 15 Cessna 206s, two Lear jets, one King Air, and three Canadian-manufactured De Havilland Twin Otters. Air wing operations carried out throughout the country were coordinated through the attorney general's Air Operations Contract Center in Mexico City. In 1984 it was speculated that, in an attempt to improve drug detection, the Mexican government might lease satellite time as a means to maintain surveillance over the country's rugged terrain. There was debate, however, as to whether such a measure would prove cost-effective in eradicating opium poppy and marijuana fields.



Various armored vehicles displayed at Independence Day parade, 1984



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Photos by Arturo Salinas

Conscription, Recruitment, and Retention

As a response to Mexico's possible entry into World War II, obligatory military service for males was established in 1941 under the Law of National Military Service (see Background and Traditions of the Armed Forces, this ch.). During January in the year of their eighteenth birthday, all Mexican male youth were required to register with their local municipal government for military service. Out of those who registered, some 250,000 were selected by lottery to begin training during January of the following year. By mid-1984 one analyst familiar with the Mexican military asserted that the number of young men selected annually may have been reduced to between 150,000 and 200,000.

Traditionally, training consisted of basic marching drills on Saturdays and Sundays for a number of consecutive weeks under the command of local officers who were approaching retirement. However, as part of a modernization program, a shift in this training procedure occurred in the late 1970s, when younger battalion and regimental commanders assumed this responsibility. This change was considered important because of the patriotic message it sent to the country's youth. Although the length of national military service varied slightly from one military region to another, training generally lasted one year. Traditionally, young Mexican men whose parents command some influence have been able to pay others to complete the service requirement in their stead.

As part of the modernization efforts, former secretary of national defense Galván López created an optional service plan. Those deciding to participate were assigned to a barracks for five months, living alongside active-duty troops. Service under this optional program included basic infantry training plus the equivalent of vocational training in a marketable skill. Among areas of course work offered under such training were construction, animal husbandry, automotive repair, and radio communications. During this term of service, the conscript was eligible for all benefits received by an active-duty soldier. Youth completing their national military service, however, were not formally inducted into the Mexican armed forces.

On completing military service, conscripts remained on active reserve status until the age of 40. Completion of the service requirement was noted on a Military Identity Card (more commonly referred to as the *cartilla),* which bore the individual's photograph and had to be revalidated every two years while he remained on active reserve. The card was also required when applying for a passport, driver's license, or employment. This procedure provided the Mexican government with a valuable means of keeping track of its adult male population.

Induction into the Mexican armed forces, whose active-duty personnel were composed entirely of volunteers, was commonly viewed as a means of upward social mobility. Recruitment efforts were carried out through posters, advertisements in local newspapers, and radio announcements. The basic requisites for induction into the armed forces were Mexican citizenship by birth, completion of one's primary education, and absence of a criminal record. Initial recruits were between the ages of 18 and 21. Recruitment of soldiers was conducted at the military zone and local levels by both the Secretariat of National Defense and the Secretariat of the Navy. Vacancies in local units were often filled by youth completing their national military service. Other recruits were often relatives or friends of those already serving in the armed forces.

Those enlisting for their first term of service received basic training at the local unit—usually not far from the individual's home—to which they were assigned. The emphasis during this first term of enlistment was on the development of basic military skills, using an "on-the-job" training approach. There was a high retention rate for first-term recruits, who usually elected to enlist for another three years. During the second enlistment period, recruits were often stationed away from their home district. Those completing this second term of service usually attained the rank of sergeant, the highest grade of noncommissioned officer (NCO). Again, there was a high retention rate for NCOs, whose primary responsibilities were the indoctrination and molding of new recruits. Because of the high ratio of commissioned officers to NCOs within the armed forces, commissioned officers were said not to rely heavily on their NCOs.

Those who enlisted to become commissioned officers had to pass a barrage of examinations for admission to one of the three service academies. The oldest and most prestigious of the three was the army's Heroic Military College, which served as the first tier of schooling in the army's professional education system. In addition to having to pay a processing fee equivalent in 1983 to approximately US$40, candidates for entrance to the Heroic Military College were required to undergo testing of intelligence, vocational aptitude, and personality. Computerized testing and scoring were introduced during the 1981–82 academic year. Top performers on the tests were accepted into the academy; those not selected had to retake the examinations the following year to try to qualify for entrance.

The administration of the examinations in Mexico City, plus the required processing fee, served to inhibit many potential candidates from applying for entrance. Minimum requirements also established that those eligible for entrance into the service academies were Mexican male citizens by birth between the ages of 16 and 21 who had completed their secondary education, were not married, and were at least 1.6 meters tall. One report noted that each year a select few first sergeants, who had graduated from one of the officer formation schools and demonstrated leadership ability, were chosen for a special one-year program at the Heroic Military College that led to their commission as second lieutenants. Political influence was also reported to be a factor in the overall student admission process. The Air College and the Heroic Naval Military School were the equivalent academies for those deciding on service in the air force or navy, respectively (see Education and Training, this ch.).

As more women joined the Mexican work force, the number of women deciding on a career in military service also grew by 1984. Although the Organic Law states that women have the same rights and duties as men in the Mexican armed forces, in practice they were not permitted to fill combat positions nor were they eligible for admission to one of the service academies. The highest rank they were legally permitted to hold was that of the United States equivalent of major general (see Uniforms, Ranks, and Insignia, this ch.). Women who enlisted in the armed forces received the same basic training as men, including handling and knowledge of weapons. Upward mobility within the military was achieved through attending one of the various officer formation schools. Women in the Mexican armed forces served almost exclusively in the areas of administration, medical care, communications, and physical education. They reportedly received the same benefits that men with the same rank and training received, and also were eligible for three months' pregnancy leave.

Education and Training

One of the key factors in the development of a professional armed force in Mexico was the emphasis placed on the military education system. Improvements in this training system received considerable attention as part of the modernization program initiated during the López Portillo administration. Curricula of the various military schools were revised in order to keep abreast of new developments in technology, and a new third tier of professional education was added that provided an equivalent of the training an officer would receive at one of the United States war colleges.

The National Defense College was created in September 1981 to provide army colonels and generals—and their counterparts in rank in the air force and navy—with advanced formal training in national security policy formulation, resource management, international relations, and economics. One published account noted that López Portillo presented the school's first lecture, entitled "Analysis of Articles 1 and 3 of the Constitution," which examined the constitutional rights guaranteed Mexican citizens and the role of education in national development. Graduates of the college received the degree of Master of Military Administration for Security and National Defense. In 1983 selected civilians working in positions related to national security were granted admission to the college. An estimated 70 to 75 percent of the professors at the college had civilian backgrounds. Although graduation from the college did not bring immediate promotion, one analyst observed that "it is from the ranks of the National Defense College graduates that will come the generals who will fill the highest military positions" in the country.

In addition to course work, the year-long program included one foreign and one domestic trip. Official visits to the United States, sponsored by the United States Department of Defense to brief students and graduates of the National Defense College, were increasingly frequent during the early 1980s. Issues covered in the briefings—which included force modernization, the military's organizational structure, command and control, and equipment acquisition policy—reflected the changing concerns of the modern Mexican military.

The Superior War College, directed by the Secretariat of National Defense, and the Center of Superior Naval Studies, directed by the Secretariat of the Navy, were the two principal schools offering advanced officer training under the second tier of the Mexican military education system. Also included in this tier were the Military College of Health Service Graduates, the Military Medical School, the Military School of Dentistry, and the Military Engineering School—all of which were controlled by the Secretariat of National Defense.

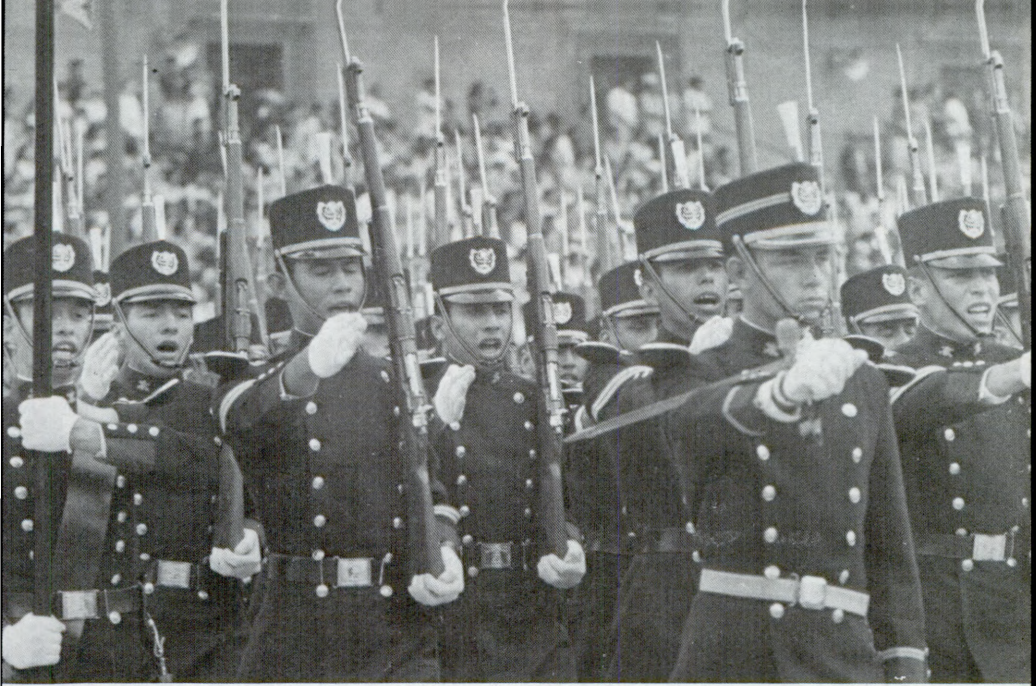
The Superior War College offered the equivalent of a college education to young officers (see Background and Traditions of the Armed Forces, this ch.). Course work emphasized preparation of officers for command positions and included the study of administration, military strategy and tactics, war gaming, and logistics, as well as more general subjects, such as military history and foreign languages. One report noted that the level of training at the

Superior War College was the rough equivalent of that received by students attending the United States Army Command and General Staff College at Fort Leavenworth, Kansas. Students were qualified for enrollment in the college after having completed between five and 10 years of military service and having successfully passed a series of examinations. The training course for army personnel was three years; the special air force program lasted two years. Navy personnel could also elect to study comparable courses at their own school, the Center of Superior Naval Studies.

Graduates of the Superior War College received the degree of Licenciate in Military Administration and the title of General Staff Graduate (Diplomado de Estado Mayor—D.E.M.), an appellation that commanded some prestige and was used with one's military rank. One analyst pointed out that graduates, in addition to practically being guaranteed eventual promotion to the rank of colonel, also received a stipend of between 10 and 25 percent of their monthly salary for the remainder of active-duty service. Those young officers not attending the college had little chance to be promoted beyond the rank of lieutenant colonel. By late 1983 there was some discussion within the Mexican armed forces about establishing graduation from the Superior War College as a prerequisite to attendance at the National Defense College.

The Secretariat of the Navy's Center of Superior Naval Studies was established in Mexico City in late 1970. The center, which was modeled after the naval war colleges of the United States, Brazil, and Peru, provided advanced training for naval officers holding the rank of captain and above. The curriculum included naval and military science, war gaming, international maritime law, and strategic and special studies on such subjects as geopolitics and logistics. The center also sponsored a correspondence program for commissioned officers assigned to naval zone installations. Those completing the center's one-year general staff course received the title of Naval General Staff Graduate.

The military's three service academies formed the first tier of the professional education system and were open to male students from either military or civilian backgrounds. The army 's Heroic Military College, located in southern Mexico City, had origins dating back to the 1820s and was the most prestigious of the three. The air force's Air College in Jalisco, under the Secretariat of National Defense, and the Heroic Naval Military School in Veracruz, under the Secretariat of the Navy, were the other two service academies that prepared students to become commissioned officers (see Conscription, Recruitment, and Retention, this ch.).



Cadets of the Heroic Military College

BATALLA 5 DE MAYO DE PUEBLA 1862.
BATALLON ZACAPOAXTLAS

Members of the Rural Defense Corps
Photos courtesy of Arturo Salinas

Graduates of the four-year program offered by the Heroic Military College, which provided the equivalent of a preparatory school education, attained the equivalent rank of second lieutenant in their arm of specialization, i.e., infantry, cavalry, artillery, engineering, or administration, and usually became section commanders. Graduates of the Air College, who select a flight or ground support orientation in their course work, also received the rank of second lieutenant as air force pilot-aviator, general specialist, or specialist in maintenance and supply. Cadets completing studies at the Heroic Naval Military School received the rank of ensign for service with the naval surface fleet, naval aviation, or marine infantry units. The navy also maintained an aviation school at the Benito Juárez International Airport in Mexico City.

A number of other educational institutions controlled by the Secretariat of National Defense also provided training for its personnel. These schools, separate from the officer training schools and the superior schools, fell under the general categories of applications schools, specialization schools, and schools offering basic training for noncommissioned personnel and technical courses. One report noted the existence of at least 23 different training centers operating for the various ranks and responsibilities of personnel under the command of the Secretariat of National Defense.

Pay and Benefits

The Law of Promotions and Compensation and the Law of Pensions and Retirement were promulgated in 1926 as means to regularize military practices, bring the armed forces under the control of the central government, and ensure the stability of the electoral system created by the Revolutionary government (see Constitutional and Legal Basis, this ch.). These laws, which have been adjusted periodically to meet the changing requirements of the government and the armed forces, came to form the backbone of the military pay and benefits system.

The personnel of all three branches of the armed forces received uniform pay and benefits for equivalent rank and years of service. Throughout the 1950s and 1960s military compensation rose at a faster rate than the cost of living. This situation, however, changed during the 1970s, as pay raises failed to keep pace with the rapidly increasing inflation rate and comparable earning power in the civilian sector. By 1982 the salary for members of the officer corps ranged from 20,000 to 30,000 pesos per month, while that of troops and NCOs was between 11,000 and 17,000 pesos. In early June

1983 a decree issued by President de la Madrid raised the compensation for officers to between 40,000 and 100,000 pesos per month. Troops and NCOs also benefited as their monthly pay rose to between 20,000 and 29,000 pesos. In spite of the spiraling inflation rate in Mexico during 1982 and 1983, this pay raise helped most military personnel keep abreast or just ahead of the cost of living. Between 1982 and 1983 the annual salaries of the secretary of national defense and the secretary of the navy, as cabinet members, were equivalent to about US$65,000.

Approximately 60 percent of the Mexican defense budget was thought to be dedicated to personnel expenses, including administrative costs, salaries, and benefits. Perquisites, stipends granted for educational achievements, and supplemental pay for those serving in command positions—ranging from the commander of a company to the secretary of national defense—added considerably to an officer's base salary. Both the amount and the availability of these fringe benefits increased as an officer ascended in rank. One study noted that additional pay was also provided to personnel engaged in hazardous service, including those assigned to paratroop or demolition units. Nevertheless, a member of the Mexican armed forces could not enjoy a comfortable standard of living by United States standards until he was promoted to the rank of lieutenant colonel, a position attained after a minimum of 14 years of service.

The real monetary rewards in military service, a knowledgeable observer noted, were received by those attending foreign military schools or serving overseas as military attachés. Mexican military officers in the United States, for example, allegedly earned at least the equivalent of US$12,000 per month. The formula used for arriving at this compensation was calculated, prior to the economic crisis, at the rate of 80 percent of the number of pesos in an officer's base pay remunerated directly in United States dollars. The observer conceded it was likely, however, that this rate had fallen to only 50 percent by 1984. If so, such a revised formula meant that an officer receiving a monthly salary in Mexico of 70,000 pesos would receive US$35,000 per month for his services while in the United States. In effect, therefore, an assignment in the United States provided a 100-fold increase over an officer's base salary in Mexico.

Pensions were also extended on a standard basis to all military personnel upon the completion of service. This benefit was increased on numerous occasions for the sake of encouraging older officers to retire in order to open positions for the promotion of younger officers. Pension benefits were determined by years of service. The mandatory retirement age was 65, but former secretaries of national defense remained on active duty all their lives. Under a 1983 modification to the Law of Pensions and Retirement, an officer completing 30 years of military service could retire at 100 percent of his or her other salary and receive the same increases granted active-duty personnel. The minimum benefit for those with fewer years of service was 20 percent of base pay. Military pensions were provided for dependents or beneficiaries upon the death of active-duty or retired personnel.

The Mexican Armed Forces Social Security Institute (Instituto de Seguro Social para las Fuerzas Armadas Mexicanas—ISSFAM) and the National Bank of the Army, Air Force, and Navy (Banco Nacional del Ejército, Fuerza Aérea, y Armada—BANJÉRCITO) also provided benefits to military personnel and their dependents. Under the ISSFAM, health care was provided through facilities established at regional military hospitals in each military zone and the Central Military Hospital in Mexico City. The quality of medical care was reported to be very good, and physicians were trained in such sophisticated specialties as microsurgery, organ transplants, and cardiovascular surgery. BANJÉRCITO offered low-interest credit and life insurance to military personnel and also provided financing for the construction of dependent housing at the country's various military installations. In 1982 rent for such housing was set at the rate of 6 percent of an individual's income. Other services and benefits were also extended to military personnel and their dependents through the zone installations. These included a primary and secondary education for military dependents, assistance with moving expenses resulting from service-related transfers, various social services, and access to stores similar to small commissaries that were operated and managed by the Secretariat of National Defense. Although by late 1983 these stores were located only in Mexico City and at a modernized zone installation under construction in Monterrey, the establishment of such stores at each zone facility throughout the country was planned in an effort to make such installations virtually self-sufficient. The military also managed a number of its own farms *(granjas)* throughout the country that provided its own food supplies.

Uniforms, Ranks, and Insignia

The Mexican armed forces adopted the system of officer ranks from the Spanish military. The highest rank within the Secretariat of National Defense was the rough equivalent of a general in the United States Army. Those holding the rank of general, which was a lifetime commission, consisted of army officers who were present or former secretaries of national defense and who were identified by an insignia composed of four silver stars and a gold eagle worn on their epaulets (see fig. 15). Lower ranks were held by both army and air force personnel. The next highest rank was the equivalent of lieutenant general. Although there was no difference between the Spanish name for this rank and that held by secretaries of national defense, these officers—who had not commanded the secretariat—were identified by three stars and an eagle. The ranking equivalents of major general and brigadier general were distinguished, in addition to the emblem of the gold eagle on their epaulets, by two silver stars and one silver star, respectively. The distinction between responsibilities of these two lower ranks was determined by their years of service and the types of units they commanded.

With respect to field-grade officers, the equivalents of colonels in the Secretariat of National Defense, according to one report, "command certain brigades and cavalry regiments, serve as chiefs of staff of a military zone, or manage staff directorates," and were identified by three gold stars arranged in a triangle on their epaulets. The equivalents of lieutenant colonels, of whom a select few were in command of a battalion or cavalry squadron, generally served as instructors or administrative aides and wore two gold stars. Majors' equivalents sometimes served as second-in-command of battalions or squadrons but usually were assigned to personnel management and training and wore insignia consisting of a single gold star.

Other commissioned officers included *capitán primero and capitán segundo,* both comparable to the United States rank of captain. First captains wore three gold bars on the epaulet; second captains had two and one-half gold bars, with the shorter bar centered between the outer two. Below these ranks were first lieutenant, with two gold bars, and second lieutenant, who was identified by a single gold bar.

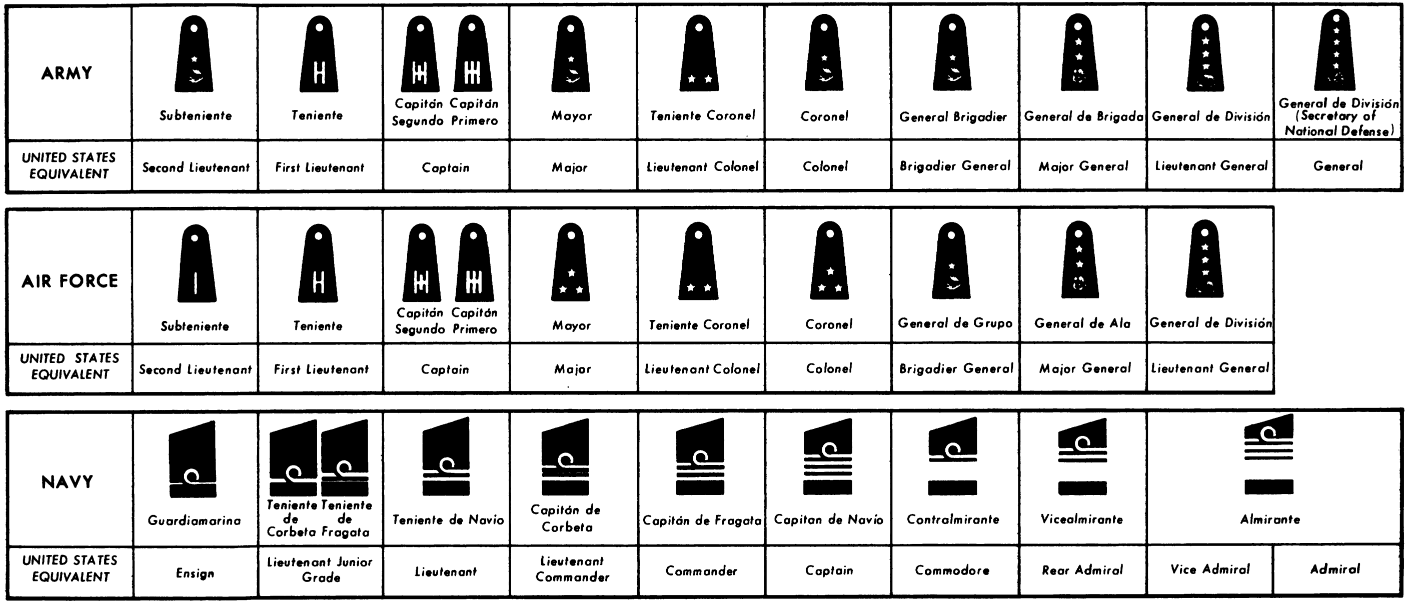
The rank insignia of commissioned naval officers was worn as gold stripes above the sleeve cuff, the uppermost stripe incorporating a braided loop some two inches in diameter. The rough equivalents corresponding to the United States Navy's ranks of admiral, vice admiral, rear admiral, and commodore also wore insignia that consisted of a wide gold stripe extending around the sleeve close to the cuff. The equivalents of admiral and vice admiral were consolidated into one rank and wore insignia that consisted of two narrow stripes and one looped stripe in addition to the wide stripe. Likewise, the rank equivalents of rear admirals had insignia composed of one narrow stripe and a looped stripe in addition to the wide stripe, and of commodores, a single looped stripe with the wide stripe. The sleeve insignia of the rank equivalent to captain was composed of three gold stripes and one looped stripe; of that equivalent to commander, two stripes and a looped stripe; and to lieutenant commander, one regular-sized gold stripe with a narrower stripe between it and the braided gold looped stripe. The equivalents in rank to lieutenants wore a single regular-sized gold stripe and a single looped stripe. The equivalents of lieutenants junior grade were divided into two ranks, the higher of which wore one narrow stripe and the regular looped stripe, and the lower, a single looped stripe. Those holding rank equivalent to ensign wore one narrow looped stripe. Members of marine infantry units were distinguished by red piping on their insignia of rank.

The army officer corps had a blue dress uniform and a dark field-green service uniform. A khaki uniform was also used for hot weather. The air force received its own uniforms for the first time in the early 1980s. The uniforms worn by naval personnel, including marines, were standard dark blue or white. The dress uniforms of army enlisted personnel were dark field-green; their branch of service was designated by a colored bar displayed on the epaulet. Infantry personnel wore a scarlet red bar; cavalry, hussar blue; artillery, crimson; and engineers, cobalt blue. Air force personnel were identified by purple bars. Members of the elite airborne brigade were distinguished by their camouflage fatigues and a purple beret. Dress uniforms for enlisted army personnel included the use of helmets as headgear. Members of the officer corps wore caps with elaborate visor decorations designating their rank.

Public Order and Internal Security

Police and Law Enforcement Organizations

In accordance with the political organization of Mexico as a federal republic, a number of federal, state, and local police and law enforcement organizations existed to provide for internal security. The responsibilities and jurisdictions of these organizations frequently overlapped, a factor finally acknowledged in mid-1984, when the Secretariat of Government announced the creation of a national consulting board designed to "coordinate and advise police forces" throughout the country. The creation of the board also reflected governmental concerns that had prompted



ARMY	Subteniente	Teniente	Capitán Segundo Capitán Primero	Mayor	Teniente Coronel	Coronel	General Brigadier	General de Brigada	General de División	General de División (Secretary of National Defense)
UNITED STATES EQUIVALENT	Second Lieutenant	First Lieutenant	Captain	Major	Lieutenant Colonel	Colonel	Brigadier General	Major General	Lieutenant General	General

AIR FORCE	Subteniente	Teniente	Capitán Segundo Capitán Primero	Mayor	Teniente Coronel	Coronel	General de Grupo	General de Ala	General de División
UNITED STATES EQUIVALENT	Second Lieutenant	First Lieutenant	Captain	Major	Lieutenant Colonel	Colonel	Brigadier General	Major General	Lieutenant General

NAVY	Guardiamarina	Teniente de Corbeta Teniente de Fragata	Teniente de Navio	Capitán de Corbeta	Capitán de Fragata	Capitan de Navio	Contralmirante	Vicealmirante	Almirante	
UNITED STATES EQUIVALENT	Ensign	Lieutenant Junior Grade	Lieutenant	Lieutenant Commander	Commander	Captain	Commodore	Rear Admiral	Vice Admiral	Admiral

Figure 15. Insignia of Officers' Ranks, 1984

the January 1984 announcement of a five-year National Public Security Program that included in its goals halting the abuse of police authority, reducing the growing crime rate, and protecting individual rights guaranteed under the Constitution.

The principal law enforcement organization in Mexico was the Federal Judicial Police, which was controlled by the attorney general. The plainclothes Federal Judicial Police acted as an investigative agency, with arrest powers, in gathering evidence for the Office of the Attorney General. The primary focus of their activities between the mid-1970s and 1984 remained assisting the attorney general in carrying out investigations and the ensuing apprehension orders related to drug trafficking (see Threats to Internal Security, this ch.). Espionage, arms trafficking, and—after the late 1982 bank nationalization—bank robberies fell under their purview. The Federal Judicial Police also served as the government's liaison with the International Criminal Police Organization (Interpol). One observer noted that the best equivalent of such a body within the United States would be the United States Federal Bureau of Investigation (FBI) and the Drug Enforcement Agency (DEA) "rolled into one."

In terms of federal law violations, the jurisdiction of the Federal Judicial Police encompassed the entire nation. For control purposes, their jurisdiction was divided into 13 zones with some 52 smaller detachment headquarters. Under coordination of the local federal prosecutor *(agente del ministerio público)*, each zone was headed by a second commandant of the Federal Judicial Police, who in turn directed his group chiefs in the outlying detachments. Individuals arrested by the Federal Judicial Police were placed at the disposition of the local federal prosecutor, who appointed subordinate attorneys to assess the merits of a case.

The size of the Federal Judicial Police force grew considerably between 1982 and 1984. In mid-1983 the organization had a complement of approximately 950 men, almost double the number of personnel of the previous year. In early 1984 the director general of the force, Manuel Ibarra Herrera, again received authority to increase the number of his agents. By mid-1984 an estimated 1,500 personnel were assigned to the Federal Judicial Police, and all indications pointed to the continued growth of the force.

The Federal Directorate of Security (Dirección Federal de Seguridad—DFS), under the command in mid-1984 of José Antonio Zorrilla Péres, a holdover from the López Portillo administration, fell under the control of the Secretariat of Government. The directorate, which was referred to occasionally as the government's "political police," was responsible for conducting investigations into matters affecting national security as well as other special investigations and duties as directed by the president. Its primary mission was guaranteeing internal security against subversive or terrorist threats. In this respect, its involvement in investigations of bank robberies, which were often perpetrated by terrorist groups, overlapped the jurisdiction of the Federal Judicial Police.

Although the DFS has existed since the 1940s, its legal basis has never been firmly established; it existed solely as an administrative creation under the Secretariat of Government. There was some speculation in mid-1984 that measures might be adopted to regularize the status of the directorate. During June of that year, agents assigned to the DFS participated in the detainment and interrogation of eight suspects tied to the recent murder of respected Mexican journalist Manuel Buendía, and they provided security, along with armed forces personnel, for the meetings of United States and Nicaraguan diplomatic representatives in Manzanillo, Colima.

Although DFS personnel had no legal arrest powers, they reportedly did have the authority to detain suspected criminals for interrogation for up to 72 hours. Likewise, although they had no formal authority to gather evidence, they regularly carried out investigations through the use of queries to other governmental organizations and informants and through the use of other surveillance techniques. Like agents assigned to the Federal Judicial Police, DFS personnel wore no uniforms. One observer noted that the size of the force had grown significantly, from between 800 and 900 personnel during the final years of the López Portillo administration to some 2,000 by mid-1984.

The major Mexico City police force, the General Directorate of Police and Traffic, became the Protection and Transit Secretariat in mid-1984. Although the police force remained under the administrative control of the Federal District attorney general, Victoria Adato (the only woman in de la Madrid's cabinet), the change in the name of the body represented an attempt by the government to erase the legacy of disrepute that the organization had inherited from its former director, "General" Arturo Durazo Moreno. A close friend of López Portillo, he had received the honorific title of "general" from his patron, a move that reportedly infuriated military officers. The commander of the force under the de la Madrid administration, however, was a real military officer, whose appointment was commonly interpreted as representing the president's serious intent to clean up the widespread corruption within the police force. One press account in April 1983 noted that the newly appointed commander, army general Ramón Mota Sánchez, had refused to wear the police uniform. "I won't put on the uniform of the police until I feel they deserve it," he was reported to have said.

In July 1983 the directorate was composed of some 27,000 personnel, of whom approximately 6,700 were employed in administrative positions. Although this manpower made it the largest law enforcement organization in Mexico, the ratio of policemen to civilians remained low in terms of Mexico City's estimated population of over 15 million. One report noted that there was only one police officer for each 2,500 of the capital's inhabitants.

A 2,000-man force comprising the directorate's Division of Investigations for the Prevention of Delinquency was dissolved in January 1983 in one of the first acts of the de la Madrid administration. The division had established an infamous reputation for corruption and violations of citizen's rights. Reportedly, many Mexico City residents suggested that the disbanding of the force—many of whose members were subsequently unemployed—had precipitated the growing crime wave. Under the command of Francisco Sahagún Baca, a close associate of Durazo Moreno, the division was held responsible not only for crimes involving extortion, armed assaults, and kidnapping but also was tied to the execution-style murders of some 16 Colombian drug smugglers whose bodies were found floating in the Río Tula in the state of Hidalgo in 1981. In mid-1984 an arrest warrant remained outstanding for Sahagún Baca, while Durazo Moreno had been apprehended by the FBI and was awaiting extradition to Mexico from a California jail cell. Although an estimated 5 to 8 percent of the division's agents were removed permanently from police service, the remainder reportedly found employment with the Federal Judicial Police, the Federal Directorate of Security, and the Federal District Judicial Police.

A number of smaller law enforcement bodies existed at the state and local level to regulate affairs related to internal security. Each of the country's 31 states and the Federal District had its own judicial police—the State Judicial Police and the Federal District Judicial Police. State police were under the direction of the state's governor; the Federal District Judicial Police fell under the control of the Federal District attorney general. Cities and municipalities had their own preventive and municipal police forces that were responsible for handling minor civil disturbances and traffic infractions. Although members of the municipal police forces wore uniforms, members of the judicial police forces did not. A federal highway police also patrolled federally designated highways and investigated traffic accidents. Highway police were assisted by military personnel on national holidays.

Immigration officers, directed by the Mexican Immigration Service under the Secretariat of Government, had the right to detain suspected undocumented aliens and, under certain conditions, to deport them without formal deportation proceedings. The plainclothes investigators, one observer noted, concentrated on the southern border with Guatemala between 1982 and 1984. Customs officers, controlled by the Secretariat of Finance, were deployed at borders and at international airports to interdict contraband entering Mexico. The National Bank of Mexico also operated its own security division that was charged with enforcing banking and monetary law violations, including the investigation of cases of counterfeit or fraud.

Finally, a number of unofficial paramilitary groups, incorporating various police officials, were alleged to exist. The most notorious of these was the White Brigade (Brigada Blanca), whose existence had been publicly denied, although reportedly privately admitted, by senior Mexican government officials. Press accounts indicated that the White Brigade was formed in 1977 as a "special antiguerrilla unit" composed of "carefully chosen" members of Mexico's police forces, including personnel assigned to the military police, the Federal Judicial Police, the Federal Directorate of Security, and the subsequently disbanded Division of Investigations for the Prevention of Delinquency. Various published reports in the late 1970s held the White Brigade responsible for the "disappearance of several hundred Mexican citizens. Although Mexican government officials repeatedly stated that most of the missing had been killed in fights between rival leftist groups, numerous accounts had reported that some missing detainees were seen at Campo Militar Número 1 in Mexico City. Amnesty International stated that not only was this military facility the alleged "headquarters" of the White Brigade but that it also served as a "clandestine detention center" and a "torture center." Despite public government denials, the repeated and consistent published reports and testimonies between 1978 and 1984 tended to give credence to the existence and operations of the White Brigade.

Traditionally, Mexican police forces were poorly trained and underpaid—conditions considered by many as contributing to alleged police brutality, corruption, and the increasing crime rate. As part of the de la Madrid administration's campaign to clean up corruption and promote law enforcement, the National Police Academy was created in 1984 to provide professional training. An August 1984 newspaper article cited Attorney General Sergio García Ramírez as stating that one-third of his personnel had received formal training through the Technical Training Institute of the Attorney General. New regulations were also issued for the Protection and Transit Secretariat in July 1984 that prohibited the use of ranks similar to those of the armed forces and established the grades of superintendent, inspector, officer, and policeman. These regulations represented the first such changes made in 43 years. A press release issued by the government reportedly explained that the new measures were issued as a means to eliminate "constant violations of individual guarantees, police brutality, and demands for bribes."

Threats to Internal Security

According to one United States Department of State official, narcotics trafficking in 1984 created a threat to internal security not only because of the tremendous amount of money it generated but also because those controlling the money had no qualms about how they used it. Numerous other outside observers maintained that such illicitly gained funds were employed in a widespread effort to corrupt public officials. In March 1984 nine Catholic bishops from southern Mexico called on the government to put an end to "the complicity, direct or indirect, of high public officials at the state and federal levels" in drug trafficking operations, specifically in the states of Oaxaca and Chiapas. The bishop's letter, parts of which were published in the Mexico City daily, *Excélsior*, expressed their concern over the impact such operations might have on national security. "We are afraid, [and] not without reason, that what has happened in other brother countries [such as Bolivia and Colombia, where narcotics traffickers have been able to sway government policies in their behalf] may happen in Mexico," it stated.

The principal efforts of Mexican government officials to halt narcotics trafficking and the production of domestically grown marijuana and opium poppies were directed in 1984 by the attorney general; support was provided by the secretariats of national defense and the navy as well as by local and state law enforcement organizations. Between 1974 and 1976 almost all heroin entering the United States came from Mexico. In 1975 the Mexican government agreed to revise, with United States assistance, its largely ineffective manual eradication campaign, Operation CANADOR, which had been carried out by military personnel since the 1940s. The new campaign, known as Operation Condor, focused on the major drug-producing states of Sinaloa, Chihuahua, and Durango—the "critical triangle"—and included aerial detection and eradication efforts as well as increased enforcement measures. By 1983 an estimated 11 percent of marijuana available in the United States and 33 percent of the heroin was of Mexican origin. Other military manual eradication campaigns targeting different areas of the country where aerial fumigation was not possible included Operations Lice, Tigre, Puma, and Pantera.

Narcotics trafficking control efforts under the attorney general were divided between the Federal Judicial Police, which was responsible for investigations and enforcement of federal drug laws, and the Campaign against Production and Trafficking of Narcotics, which supervised planning, interdiction, eradication, and other drug control measures. During 1983 the campaign received 43 percent of the attorney general's budget, some 1.3 billion pesos, which represented a 75-percent increase over its allocation for 1982. The United States Department of State's FY 1985 narcotics control assistance request included US$8.9 million to support the Mexican aerial eradication program. According to the request submitted to the United States Congress in March 1984, some 2,472 hectares of opium poppy and 2,674 hectares of marijuana were eradicated by Mexican authorities during 1983. In contrast, comparable figures for 1982 showed only 1,211 hectares of poppy fields and 886 hectares of marijuana destroyed. The de la Madrid government continued to give the eradication program high priority.

Detection and eradication of domestically produced drugs remained in 1984 the major concern of the Mexican campaign. Approximately one-half of the nearly US$10 million in narcotics control assistance provided by the United States was dedicated to aerial eradication efforts. By mid-1983 the Office of the Attorney General controlled a fleet of some 67 aircraft, which included helicopters, airplanes, and small jets, and speculation existed that further equipment purchases were planned (see Other Sources of Defense-Related Equipment, this ch.). The Air Operations Contract Center, which coordinated the aerial program, was based at the Benito Juárez International Airport in Mexico City. Three other flight operations centers, located in Culiacán, Chihuahua, and Acapulco, also coordinated surveillance in their regions.

Although by 1984 the Mexican and United States governments were together spending close to US$20 million on increased control, drug producers had not only developed more sophisticated techniques for concealing their crops but also had expanded their production areas to encompass bands stretching from Guadalajara to just north of Acapulco and from Oaxaca to Tuxtla Gutiérrez, the capital of the state of Chiapas. Those responsible for aerial detection also found plantings in areas previously believed incapable of production, including a region just north of Veracruz and one in the Yucatan peninsula. A major year-long opium production survey was being considered in 1984. It would determine changing cultivation patterns, in terms of both the size of crops and the shifts in their locations. The program, two-thirds of which was to be funded by the United States, was to include data collected from random sample surveys carried out over at least three separate opium poppy-growing seasons. In addition to domestic production, Mexico had become by 1984 an important transshipment point for cocaine and other drugs moving northward from the South American continent.

As early as 1976 the relationship between northern-bound drug and southern-bound weapons traffic in Mexico was publicly acknowledged by United States officials. Although at the time the Mexican government refused to comment on reports that Mexican narcotics were being exchanged for illegal arms, DEA officials and other government witnesses presented testimony confirming the trade at hearings called by Texas senator Lloyd Bentsen in May of that year. A public statement made by the director of the El Paso Intelligence Center noted that drug traffickers as well as guerrilla groups wanted automatic weapons. The "exchange rate," as indicated by Senator Bentsen, was one M-16 rifle for an ounce of heroin.

Although Mexico City press reports on the hearing sent shock waves through the Echeverría administration, by 1984 the existence of the trade had been reluctantly acknowledged by government officials. In 1978 and 1979 many Nicaraguan revolutionaries had openly admitted having received their weapons through Mexico. One analyst noted that as late as July 1984 arms continued to pass through Mexico on their way to Central America. Data compiled by the Mexican Office of the Attorney General noted a 1981 peak of 1,751 hand weapons—both long and short arms—confiscated by authorities carrying out drug enforcement efforts. By 1983 the number of firearms seized had dropped to 884. It was impossible to know how many of these were bound for Central America.

Although Mexican authorities continued efforts to halt the flow of arms, their main concern with respect to internal security was that Mexico not become the destination of such weapons. As one United States military analyst observed, "Drugs are just a commodity to be sold, but guns can make revolutionaries." Mexican guerrillas and revolutionaries in mid-1984 remained fragmented and divided into splinter groups concerned more with local injustices suffered at the hands of large landowners and industrial interests than with the overthrow of the central government. Several reasons have been alternately cited for this fragmentation, including the territorial size and geographical diversity of the country, the political reforms introduced by the López Portillo administration to enhance the credibility of the Institutional Revolutionary Party, and the government's sophisticated internal security apparatus (see The Rules of Political Competition, ch. 4). One United States military officer, commenting in 1984, noted that Mexico would remain in a "pre-revolutionary" state until such guerrilla forces were able to coalesce.

A number of guerrilla organizations, however, were active in Mexico from the late 1960s into the 1970s. The three principal groups that operated in the countryside during that period included the National Revolutionary Civic Association (Asociación Cívica Nacional Revolucionaria—ACNR), which was active between 1968 and 1971; the Party of the Poor, from 1967 to 1974; and the Mexican Proletarian Party, which carried out land seizures and army patrol ambushes between 1974 and 1978. Each group was directed by a charismatic leader, and each failed to carry on organized operations after the leader's death. The head of the ACNR, Genaro Vásquez Rojas, was killed in a 1971 automobile crash while fleeing authorities. Lucio Cabañas of the Party of the Poor died in a confrontation with army units in December 1974. Florencio "El Güero" Medrano Medreros, who led the Mexican Proletarian Party, was killed in a shoot-out with authorities in the late 1970s.

Urban guerrilla and terrorist organizations of that era also failed to survive. In 1981 police officials claimed to have broken the last cell of the Twenty-Third of September Communist League, supposedly the largest and longest-lived of Mexico's urban guerrilla groups. The Communist League, which was formed in 1974, had reportedly incorporated members from several other urban guerrilla fronts, including the People's Union, which grew out of the social turmoil of 1968 and joined the league in 1975; the Revolutionary Action Movement (Movimiento de Acción Revolucionaria—MAR), which was active in Mexico City between 1970 and 1972; and the People's Armed Revolutionary Forces (Fuerzas Revolucionarias Armadas del Pueblo—FRAP), which first received attention as a result of its 1973 kidnapping of United States consular officer Terrance Leonhardy (who was found unharmed after some 30 imprisoned guerrillas were released to exile in Cuba and a US$80,000 ransom was paid). Another United States consular official who was kidnapped the following year, reportedly by FRAP members, was found dead in the desert just outside Hermosillo, Sonora, in July 1974. FRAP was reported to have joined forces with the league in September

1977. By 1976, however, Mexican political analysts and journalists expressed considerable doubt as to who was responsible for the many terrorist acts committed in the Communist League's name. A June 1976 *Washington Post* article by Marlise Simons cited numerous instances that had led "people to conclude that the present organization is a rightist group disguised as the left, a tactic that has been used in Mexico before."

Criminal Justice

Although guerrilla activity abated between the late 1970s and 1984, the crime rate in Mexico rose. The most rapid increase occurred between 1982 and 1984, a period coinciding with the onset of the country's severe economic problems. In Mexico City, which was hardest hit, the de la Madrid administration instituted new measures to combat the growing lawlessness, including the reorganization and renaming of the Protection and Transit Secretariat and the establishment of mandatory training programs for law enforcement personnel (see Police and Law Enforcement Organizations, this ch.).

Crimes against individuals, which had been relatively rare even into the mid-1970s, had become more common. One Mexico City newspaper warned residents, who were not accustomed to being concerned with crime, that they "must take every precaution possible due to the latent danger of armed robbers while walking, driving, parked, in a restaurant or bank, and even while quietly at home." Not only have incidents of armed assault and robbery increased, but murder and rape were also on the rise. A 1983 report prepared by a Mexican women's organization estimated that in 1982 alone there were approximately 80,000 cases of rape reported throughout the country, of which 10,000 occurred in Mexico City. The study also estimated that roughly 95 percent of all sex crimes go either unreported or unpunished. Although the director of the reorganized Mexico City police force maintained that crime was diminishing, a press report in July 1984 claimed that two to three policemen were wounded or killed each day in shoot-outs with criminals.

The Mexican government estimated that 15,987 persons were held in federal prisons in 1983, down from a peak of 31,177 in 1980. Another 1,996 men, in contrast to 1,383 in 1980, were serving sentences at the penal colony on the Islas Tres Marías, off the coast of Nayarit. Efforts to improve prison conditions continued under the de la Madrid administration. Prisons located in the Federal District, including the women's penitentiary of Santa

Marta Acatitla, received the major benefits of increased food allocations, training in marketable skills, and the development of prison industries producing goods sold on the open market. Other prisons, however, remained less than model institutions. One United States government report cited overcrowding, "sometimes to more than double the intended population," as a chronic problem. Other publicly registered complaints centered on the lack of trained prison guards, corruption among the prison staff, and the mistreatment of prisoners. One United States analyst categorized Mexican penal institutions as "a micro-socioeconomic and political system" that in many ways paralleled the problems of Mexican society in general.

In some respects, however, Mexican prisons also exhibited humane qualities. In 1971 conjugal visiting rights two days a week were established for male prisoners. Prisoners held at the penal colony were permitted to bring in their entire families to live with them temporarily. In 1973 these rights were extended to female prisoners, who were provided contraceptives on request. Women were also permitted to keep with them those of their children who were under five years old.

Under the terms of the 1977 Prisoner Transfer Treaty between the United States and Mexico, United States prisoners in Mexican jails and Mexicans held in United States prisons could choose to have their sentences transferred for service in their home country. In the first transfer under the treaty, which had been prompted by complaints lodged by United States prisoners about living conditions in Mexican penal institutions, some 232 United States nationals held in Mexican jails returned in 1977 to serve the remainder of their prison sentences in their home country. In December of that year 32 Mexican citizens also chose to return to Mexico to complete their sentences. Thereafter, transfers were carried out on a quarterly basis; approximately 50 prisoners from each country elected to be transferred each year between 1978 and 1983. By the end of 1983 a total of 627 United States citizens had returned from Mexican prisons, and 395 Mexican nationals held in United States prisons had opted to serve out their sentences in their home country's institutions.

An extradition treaty between the United States and Mexico entered into force in January 1980. The terms of the treaty required the mutual recognition under the laws of each nation that a crime had been committed. Because of the extensive processing required under extradition requests, however, an informal network of cooperation developed among police forces on both sides of the border, whereby suspected criminals who had fled to the neighboring country to escape apprehension were routinely turned over, without formal proceedings, to police in the country where the crime was committed. By mid-1984 there were seven outstanding extradition requests made by the United States and seven by Mexico. Among them were the Mexican request for the extradition of Durazo Moreno and the United States request for the return of William Morales, a leader of the Puerto Rican Armed National Liberation Front who was wanted for a series of bombings in New York in 1978. Both men were in custody in mid-1984.

The death penalty had not been applied in Mexico since 1929, when the assassin of president-elect Obregón was executed. Under the federal penal code of January 1930, the death penalty had been abolished. By 1975 all state codes had also eliminated the death penalty. The military, however, still held certain offenses as punishable by death, including insubordination with violence, causing the death of a superior officer, certain kinds of looting, offenses against military honor, and treason.

In 1984 various Mexican organizations continued to criticize their government for engaging in instances of prolonged incommunicado detention, convictions based on confessions extracted under torture, and "disappearances" of political detainees. Under Article 19 of the Constitution, detention by authorities of suspected criminals for more than 72 hours was prohibited. The use of torture was also proscribed by the federal penal code as an abuse of authority and was punishable by a maximum of six years' imprisonment, a fine, and removal of the authority from office. The Mexico-based National Committee in Defense of Prisoners, Persecuted, Disappeared, and Political Exiles maintained that in 1983 approximately 500 individuals remained "missing" after a series of amnesties granted to political prisoners held in Mexico during the López Portillo administration (see Police and Law Enforcement Organizations, this ch.).

* * *

Edwin Lieuwen's *Mexican Militarism: The Political Rise and Fall of the Revolutionary Army, 1910–1940,* although published in 1968, remains an excellent source not only on Mexican military participation in politics but also on the military itself during this formative period. David F. Ronfeldt's "The Mexican Army and Political Order since 1940," published in Abraham F. Lowenthal's *Armies and Politics in Latin America in 1976,* studies the relationship between the military and the Mexican political elite and analyzes the military's mission within the Mexican state. Edward J. Williams, Lieutenant Colonel Alden M. Cunningham, and Major Stephen J. Wager also have published analyses of the military modernization program and the changing perceptions of national security in Mexico. Among Mexican publications consulted, *El ejército mexicano* by General Brigadier D.E.M. Jesús de León Toral presents the official history of the Mexican armed forces through 1982. Guillermo Boils' *Los militares y la política en México, 1915–1974* and Gloria Fuentes' *El ejército mexicano*, published in 1983, also provide significant information on the armed forces. A considerable amount of information heretofore unpublished was obtained from interviews with United States government officials and others working with Mexico. (For further information and complete citations, see Bibliography.)

Appendix

Table

1 Metric Conversion Coefficients
2 Population and Average Annual Growth Rate by Administrative Division, 1950–80
3 Income Distribution by Decile, 1958, 1968, and 1977
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Table 1. Metric Conversion Coefficients

When you know	Multiply by	To find
Millimeters	0.04	inches
Centimeters	0.39	inches
Meters	3.3	feet
Kilometers	0.62	miles
Hectares (10,000 m)	2.47	acres
Square kilometers	0.39	square miles
Cubic meters	35.3	cubic feet
Liters	0.26	gallons
Kilograms	2.2	pounds
Metric tons	0.98	long tons
	1.1	short tons
	2,204	pounds
Degrees Celsius (Centigrade)	9 divide by 5 and add 32	degrees Fahrenheit

Table 2. Population and Average Annual Growth Rate by Administrative Division, 1950–80
(in thousands)

Administrative Division	Population				Annual growth Rate		
	1950	1960	1970	1980	1950–60	1960–70	1970–80
Aguascalientes	188.1	243.4	354.9	521.4	2.6	3.5	3.9
Baja California Norte	227.0	520.2	922.6	1,262.0	8.6	5.5	3.4
Baja California Sur	60.9	81.6	136.9	227.8	3.0	4.8	5.4
Campeche	122.1	168.2	263.6	382.2	3.3	4.3	3.9
Coahuila	720.6	907.7	1,166.0	1,607.0	2.3	2.2	3.3
Colima	112.3	164.5	253.4	350.4	3.9	4.0	3.4
Chiapas	907.0	1,210.9	1,642.5	2,158.9	2.9	2.7	2.8
Chihuahua	846.4	1,226.8	1,693.2	1,990.7	3.8	2.9	1.8
Durango	629.9	760.8	983.5	1,192.7	1.9	2.2	2.1
Federal District	3,050.4	4,870.9	7,229.0	9,639.8	4.8	3.6	3.0
Guanajuato	1,328.7	1,735.5	2,382.6	3,135.4	2.7	2.8	2.9
Guerrero	919.4	1,186.7	1,678.0	2,236.1	2.6	3.1	3.0
Hidalgo	850.4	994.6	1,247.1	1,559.3	1.6	1.9	2.3
Jalisco	1,746.8	2,443.3	3,462.4	4,419.2	3.4	3.2	2.6
México	1,392.6	1,897.9	4,096.1	7,767.9	3.1	7.6	6.8
Michoacán	1,422.7	1,851.9	2,428.3	3,136.8	2.7	2.4	2.7

Table 2. (Continued)

Morelos	272.8	386.3	654.0	960.2	3.5	5.0	4.1
Nayarit	290.1	390.0	572.8	749.2	3.0	3.5	2.9
Nuevo León	740.2	1,078.9	1,789.5	2,536.2	3.8	4.8	3.7
Oaxaca	1,421.3	1,727.3	2,103.8	2,585.9	2.0	1.6	2.2
Puebla	1,625.8	1,973.8	2,626.0	3,378.0	2.0	2.5	2.6
Querétaro	286.2	355.0	512.0	752.8	2.2	3.3	4.0
Quintana Roo	27.0	50.2	91.2	216.9	6.4	6.0	8.7
San Luis Potosí	856.1	1,048.3	1,338.3	1,719.1	2.0	2.1	2.6
Sinaloa	635.7	838.4	1,338.3	1,937.7	2.8	4.4	3.9
Sonora	510.6	783.4	1,155.8	1,540.8	4.4	3.6	3.0
Tabasco	362.7	496.3	811.1	1,183.3	3.2	4.6	4.0
Tamaulipas	718.2	1,024.2	1,531.0	1,977.6	3.6	3.7	2.7
Tlaxcala	284.6	346.7	441.0	564.6	2.0	2.0	2.6
Veracruz	2,040.2	2,727.9	4,010.0	5,415.2	2.9	3.5	3.2
Yucatán	516.9	614.0	790.8	1,062.9	1.7	2.2	3.0
Zacatecas	665.5	817.8	988.5	1,178.1	2.1	1.6	1.8
TOTAL*	25,791.0	34,923.1	50,694.6	69,346.9	3.1	3.4	3.3

*Figures do not add to total because of rounding.

Source: Based on information from Thomas G. Sanders, *Mexican Population: 1982*, Hanover, New Hampshire, 1982, 9.

Table 3. Income Distribution by Decile, 1958, 1968, and 1977 (in percentage of total national income)

Decile	1958	1968	1977
I	2.32	1.21	1.08
II	3.21	2.21	2.21
III	4.06	3.04	3.23
IV	4.98	4.23	4.42
V	6.02	5.07	5.73
VI	7.49	6.46	7.15
VII	8.29	8.28	9.11
VIII	10.73	11.39	11.98
IX	17.20	16.02	17.09
X	35.70	42.05	37.99
TOTAL ...	100.0	100.0	100.0*

*Figures do not add to total because of rounding.

Source: Based on information from Enrique Hernández Laos and Jorge Córdoba Chávez, "Estructura de la distribución del ingreso en México," *Comercio exterior*, Mexico City, 29, No. 5, May 1979, 507.

Table 4. Average Monthly Household Income, 1977 (in United States dollars)[1]

Range of Monthly Household Income	Number of Households	Percentage of Households	Average Monthly Household Income
Zero	31,723	0.3	---[2]
Zero to 31	1,130,208	10.2	19
31 to 44	699,869	6.3	38
44 to 59	744,240	6.7	52
59 to 79	947,669	8.5	69
79 to 106	1,047,939	9.4	93
106 to 139	1,133,454	10.2	123
139 to 189	1,400,719	12.6	161
189 to 252	1,151,055	10.4	217
252 to 330	972,235	8.7	287
330 to 446	777,612	7.0	388
446 to 589	469,312	4.2	514
589 to 792	319,520	2.9	679
Over 792	289,638	2.6	1,231
MEXICO	11,115,143	100.0	203

[1] Based on an exchange rate of 22.74 pesos per United States dollar.

[2] Insufficient sample data to estimate the average.

Source: Based on information from Mexico, Secretaría de Programación y Presupuesto, Coordinación General de los Servicios Nacionales de Estadística, Geografía, e Informática, *Encuesta nacional de ingresos y gastos de los hogares, 1977*, Mexico City, 1979, 40.

Table 5. Public Sector Finances, 1982 and 1983 (in millions of pesos)[1]

	1982	1983
Revenues		
Federal government		
Taxes paid by PEMEX[2]	457.8	1,170.7
Other taxes	967.4	1,805.2
Other	107.1	245.7
Total federal government	1,532.3	3,221.6
Parastatal enterprises[3]		
PEMEX	1,028.8	2,544.8
Other	971.1	1,710.2
Total parastatal enterprises	1,999.9	4,255.0
Sectors outside the budget (Metro subway system in Federal District)	170.8	366.4
Compensatory transactions (to avoid double counting)	-857.4	-1,937.8
Total revenues	2,845.6	5,905.2
Expenditures		
Personnel	786.0	1,164.3
Interest	817.5	2,157.2
Subsidies and transfers	612.0	675.5
Investment	1,016.1	1,328.1
Other	1,051.8	1,942.7
Total expenditures	4,283.4	7,267.8
Total budget deficit	1,437.8	1,362.6
Deficit of public sector outside budget	94.6	82.2
Financial intermediation by development banks	128.0	75.0
Total Public Sector Deficit	1,660.4	1,519.8

[1] For value of the peso—see Glossary.

[2] Petróleos Mexicanos (Mexican Petroleum Company).

[3] See Glossary.

Source: Based on information from the United States, Department of Commerce, *Foreign Economic Trends and Their Implications for the United States: Mexico*, Washington, July 1984, 7-8.

Table 6. External Debt Outstanding and Disbursed, 1980–83 (in billions of United States dollars, end of year)

Debt	1980	1981	1982	1983
Public sector				
Medium and long-term				
Financial institutions	24.7	31.8	36.1	38.8
International organizations	3.3	4.0	4.3	4.4
Bilateral	1.2	2.3	2.9	4.1
Other	3.1	4.1	6.2	3.9
Total medium and long-term	32.3	42.2	49.5	51.2
Short term	1.5	10.8	9.3[1]	9.7[1]
Total public sector	33.8	53.0	58.8	60.9
Nationalized banks				
Medium and long-term	1.3	1.9	0.5	0.6
Short-term	3.8	5.1	7.3	7.3
Total nationalized banks	5.1	7.0	8.0[2]	8.0[2]
Private sector				
Medium and long-term	6.0	8.3	9.5	9.5
Short-term	5.8	6.6	8.5	8.5
Total private sector	11.8	14.9	18.0	18.0
Total external debt				
Medium and long-term	39.6	52.4	59.0[3]	62.4[3]
Short-term	11.1	22.5	25.8[3]	24.5[3]
Total external debt	50.7	74.9	84.8	86.9
Memorandum item debt to banks				
Public sector	26.2	42.6	45.4	48.5
Private sector	16.9	21.9	25.8	25.9
Total memorandum item debt to banks	43.1	64.5	71.2	74.4

[1] Includes debt being restructured.

[2] Figures do not add to total because of rounding.

[3] As published.

Table 7 *Actual Average Rate of Exchange, 1954–83*
(in pesos per United States dollar)

								1982		1983	
	1954-75	1976	1977	1978	1979	1980	1981	Free Market Rate	Controlled Rate	Free Market Rate	Controlled Rate
Yearly period average	12.49	15.44	22.58	22.77	22.81	22.95	24.51	57.18	---	148.63	110.25
Monthly average											
January		12.49	20.90	22.72	22.71	22.81	23.34	26.43	---	148.85	98.56
February		12.49	22.55	22.72	22.66	22.82	23.48	31.43	---	148.65	102.40
March		12.49	22.67	22.74	22.81	22.90	23.65	45.27	---	148.65	106.23
April		12.49	22.62	22.74	22.83	23.83	23.85	45.95	---	148.65	110.20
May		12.49	22.75	22.73	22.82	22.84	24.09	46.78	---	148.65	114.16
June		12.49	22.89	22.80	22.84	22.88	24.33	47.62	---	148.58	118.13
July		12.49	22.91	22.84	22.84	22.97	24.57	48.50	---	148.36	122.09
August		12.49	22.86	22.84	22.81	23.02	24.77	83.75	69.50	148.35	126.12
September		20.05	22.78	22.76	22.78	23.00	25.04	70.00	50.00	148.47	130.09
October		20.77	22.68	22.77	22.81	23.06	25.36	70.00	50.00	151.34	134.05
November		24.38	22.66	22.79	22.86	23.15	25.68	70.00	50.00	155.31	138.02
December		20.21	22.67	22.74	22.81	23.19	26.01	100.39	67.72	159.27	141.98

--- means no controlled rate until August 1982.

Table 8. Amortization Schedule of Public External Debt Before and After Restructuring, 1982–84
(in millions of United States dollars)

Year Payment Due	As Scheduled		
	1982	1983	1984
1982	8,144	5,270	0
1983	8,960	4,590	0
1984	5,368	2,259	0
1985	9,672	9,370	1,910
1986	5,148	8,498	2,070
1987	7,525	12,468	1,940
1988	4,670	10,777	2,440
1989	3,521	8,906	3,770
1990	1,129	6,229	4,410
Other years . . .	4,286	4,050	47,340

Source: Based on information from United States, Department of Commerce, *Foreign Economic Trends and Their Implicaitons for the United States: Mexico*, Washington, July 1984, 15; and Peter Montagnon, "Mexico's Pace-Setting Way Forward," *Financial Times*, London, September 17, 1984.

Table 9. Production of Natural Gas and Crude Oil, 1982 and 1983 (natural gas in millions of cubic feet; crude oil in thousands of 42-gallon barrels)

Area of Production	Natural Gas		Crude Oil[1]	
	1982	1983	1982	1983
Marine Zone (Bahía de Campeche)	313,588	328,999	590,353	610,947
Southeastern Zone				
Comalcalco District				
Mesozoic[2]	772,593	735,279	304,533	268,228
Tertiary	5,912	5,217	6,704	5,047
Total Comalcalco District	778,505	740,496	311,237	273,275
Ciudad Pémex District	155,629	120,551	7	5
Total Southeastern Zone	934,134	861,047	311,244	273,279
Northern Zone				
Northern District	19,586	15,231	11,754	10,054
Southern District	8,600	9,418	7,039	7,145
Northeastern Frontier District	146,346	143,636	150	219
Total Northern Zone	174,532	168,285	18,943	17,418
Central Zone				
Poza Rica District	51,309	41,289	42,287	32,856
Cuenca Papaloapan District	22,732	23,134	4,279	3,688
Nueva Faja de Oro District	11,359	15,948	n.a.	n.a.
Total Central Zone	85,400	80,371	46,566	36,544
Southern Zone				
Agua Dulce District	20,178	19,942	17,536	17,782
El Plan District	20,496	19,489	16,261	15,374
Nanchital District	1,593	1,427	1,526	1,578
Total Southern Zone	42,267	40,858	35,324	34,734
TOTAL	1,549,921	1 479,560	1,002,430	972,922

n.a.--not available.

[1] Does not include condensate, as was practice up to 1980.

[2] Referred to as Cretaceous up to 1980.

[3] Figures do not add to total because of rounding.

Source: Based on information from United States, Department of the Interior, Bureau of Mines, *Preprint from the 1983 Bureau of Mines Minerals Yearbook*, Washington, 1984.

Table 10. Production of Refined Petroleum Products, 1980–83
(in thousands of 42-gallon barrels)

Commodity	1980	1981	1983	1983
Gasoline				
Aviation	622	544	653	420
Other	118,855	130,559	126,410	129,230
Total gasoline	119,477	131,103	127,063	129,650
Jet fuel	10,089	10,588	11,177	9,998
Kerosene	15,164	15,047	16,541	14,258
Distillate fuel oil (diesel)	89,392	98,530	84,254	81,745
Residual fuel oil	112,903	126,665	127,621	127,819
Lubricants	2,860	3,512	2,854	2,402
Liquefied petroleum gas	43,829	49,595	55,042	56,539
Asphalt	6,155	6,651	7,288	6,185
Unspecified	6,656	7,533	7,841	9,430
Refinery fuel and losses	18,478	21,856	22,478	28,951
TOTAL	425,003	471,060*	462,000*	466,977

*Figures may not add to total because of rounding.

Source: Based on information from United States, Department of the Interior, Bureau of Mines, *Preprint from the 1983 Bureau of Mines Minerals Yearbook*, Washington, 1984.

Table 11. Production and Exports of Crude Oil, 1980–83 (in thousands of barrels)

	1980	1981	1982	1983
Total production	708,454.0	843,933.0	1,002,430.0	972,922.0
Production per day	1,941.0	2,312.0	2,746.0	2,666.0
Exports	302,129.0	400,778.0	546,600.0	561,005.0
Percentage share exported	43.0	47.5	54.0	58.0
Exports to the United States	194,172.0	177,510.0	264,988.0	279,703.0
Percentage share exported to the United States	9.8	10.1	18.7	23.0

Source: Based on information from United States, Department of the Interior, Bureau of Mines, *Preprint from the 1983 Bureau of Mines Minerals Yearbook*, Washington, 1984.

Table 12. Proven Hydrocarbon Reserves, 1983 (in millions of barrels unless otherwise indicated)

Zone	Dry Natural Gas[1]	Liquid Hydrocarbons Crude Oil	 Condensate	 Dry Natural Gas[2]	Total
Marine-Bahía de Campeche	12,241	28,734	3,285	2,448	34,467
Chicontepec	26,702	10,920	1,321	5,340	17,581
Southeastern	24,720	7,672	2,062	4,950	14,684
Northern	8,577	400	258	1,715	2,373
Central	3,566	1,294	187	713	2,194
Southern	1,192	891	72	238	1,201
TOTAL	76,998	49,911	7,185	15,404	72,500

[1] In billions of cubic feet.

[2] In liquid equivalent.

Source: Based on information from United States, Department of the Interior, Bureau of Mines, *Preprint from the 1983 Bureau of Mines Minerals Yearbook*, Washington, 1984.

Table 13. Production of Selected Minerals, 1981–83

Mineral	Unit	1981	1982	1983
Metallic minerals				
Aluminum	tons	43,237	41,180	39,706
Antimony	-do-	1,800	1,565	2,519
Arsenic	-do-	4,936	3,590	3,452
Bismuth	-do-	656	606	545
Cadmium	-do-	1,433	1,444	1,341
Copper	-do-	230,466	239,091	206,062
Gold	troy ounces	203,160	196,248	222,804
Iron ore	thousands of tons	5,293	5,382	5,306
Lead	tons	157,384	145,844	167,405
Manganese	-do-	208,193	183,120	133,004
Molybdenum . . .	-do-	451	5,190	5,866
Silver	thousands of troy ounces	52,916	59,175	61,435
Steel	thousands of tons	7,605	7,048	6,917
Tungsten	tons	199	99	90
Zinc	-do-	211,629	231,910	257,444
Nonmetallic minerals				
Barite	tons	317,738	323,753	357,043
Cement	thousands of tons	18,065	19,300	16,850
Diatomite	tons	56,600	56,340	56,000
Feldspar	thousands of tons	130,825	115,560	110,000
Fluorite (fluorspar)	tons	924,854	631,386	556,977
Graphite	-do-	41,142	34,370	44,327
Phosphate	-do-	360,611	512,096	498,112
Salt	thousands of tons	7,955	5,480	5,700
Sulfur	-do-	2,077	1,815	1,602
Mineral fuels				
Coal	-do-	8,086	7,619	8,983
Coke	-do-	3,133	2,450	2,442

Source: Based on information from United States, Department of the Interior, Bureau of Mines, *Preprint from the 1983 Bureau of Mines Minerals Yearbook*, Washington, 1984, n.p.; and "La Minería Mexicanana en 1983," *El mercado de valores*, Mexico City, July 23, 1984, 2.

Table 14. Production of Selected Crops, 1980–83
(in thousands of tons)

Crop	1980	1981	1982	1983
Wheat	2,650	3,050	4,200	3,200
Rice	390	585	510	450
Corn	10,400	12,500	7,000	9,300
Barley	440	320	320	400
Oats	50	70	70	100
Sorghum	3,800	4,000	2,800	4,500
Beans	900	1,300	800	1,100
Potatoes	892	1,075	1,200	1,195
Onions	372	513	450	537
Sugarcane	31,600	28,677	31,150	33,858
Tobacco	70	62	68	60
Cotton	347	314	181	218
Cotton seed	590	525	305	370
Soybeans	280	680	550	620
Sesame seed	140	80	45	70
Cantaloupes	326	302	363	386
Tomatoes	1,200	1,100	1,280	1,090
Bell peppers	392	433	420	482
Oranges	1,600	1,650	1,350	1,000
Strawberries	83	77	64	81
Bananas	1,948	1,600	1,700	1,940
Pineapples	605	550	440	250
Grapes	441	577	530	600
Coffee	232	243	246	282
Cocoa beans	36	38	40	42
Henequen	72	69	70	76

Source: Based on information from the United States, Department of Agriculture, Economic Research Service, "World Indices of Agricultural and Food Production," *Statistical Bulletin*, 1984, 31.

Table 15. *Summary of Balance of Payments, 1980–83*
(in millions of United States dollars)

	1980	1981	1982	1983
Exports				
Petroleum	9,449	13,305	15,623	14,793
Nonpetroleum	5,685	6,114	5,607	6,606
Nonfactor services	8,472	9,659	6,028	5,444
Total exports	23,606	29,079	27,258	26,843
Imports				
Merchandise (f.o.b.)[1]	18,832	23,930	14,437	7,721
Nonfactor services	7,373	10,434	7,383	4,952
Total imports	26,206	34,364	21,820	12,673
Resource balance	-2,600	-5,285	5,438	14,170
Factor income (net)				
Remitted profits	-444	-551	-642	-184
Public sector interest payments	-3,958	-5,476	-8,400	-7,346
Other	-497	-1,521	-1,539	-1,450
Total factor income (net)	-4,898[2]	-7,548	-10,581	-8,980
Balance of goods and services	-7,498	-12,833	-5,143	-5,190
Unilateral transfers (net)	275	289	265	356
Balance on current account	-7,223	-12,544	-4,878	5,546

Table 15. (Continued)
(in millions of United States dollars)

	1980	1981	1982	1983
Capital				
Long-term Public (net)				
Disbursements	7,771	13,823	14,250	8,305
Amortization	-3,713	-5,166	-5,387	-4,841
Total Public (net)	4,059[2]	8,657	8,863	3,464
Long-term Private (net)	1,523	1,851	797	348
Total Long-term (net)	5,581[2]	10,508	9,660	3,812
Short-term (net)	5,113	10,163	-1,737	-5,040
Direct foreign investment	1,254	1,189	709	374
Balance on Capital Account	11,948	21,860	8,632	-854
Credit from IMF[3]	74	70	n.a.	n.a.
Errors and omissions	-3,574	-8,303	-6,939	-1,586
Change in reserves[4]	-1,151	-1,012	3,185	-3,106
Reserve level	3,653	4,665	1,480	4,586

n.a.--not available.

[1] Free on board.

[2] Figures may not add to total because of rounding.

[3] International Monetary Fund.

[4] A negative sign indicates an increase in currency reserves.

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Glossary

amparo—A category of legal actions that guards individual civil rights. Literally, *amparo* signifies protection, assistance, or human refuge.

ejido—A landholding peasant community or the land owned collectively by the members of such a community. An *ejido,* according to Mexican legislation, is a legal entity of the "social interest sector," and its jurisdiction is in the hands of Mexican-born peasants. Its holdings consist of the *ejidal* plots, i.e., individual farming plots, the school plots, the *ejidal* urban zones, the houses and annexes to each plot, and any water resources and forest areas associated with the community. *Ejido* lands are inalienable, nontransferable, and nonattachable.

Two basic kinds of *ejidos* exist: the "individual" *ejido,* in which land tenure and ownership are legally vested in a community but cropland is allocated on a semipermanent basis among the individual *ejidatarios;* nd the "collective" *ejido,* in which land resources are pooled for collectively organized production. A majority of *ejidos* are of the individual kind.

fiscal year (FY)—In the United States the fiscal year runs from October 1 of the previous calendar year to September 30 of the corresponding calendar year. The Mexican fiscal year is identical to the calendar year.

gross domestic product (GDP)—A value measure on the flow of domestic goods and services produced by an economy over a period, such as a year. Only output values of goods for final consumption and investment are included because the values of primary and intermediate production are assumed to be included in final prices. GDP is sometimes aggregated and shown in market prices, meaning that indirect taxes and subsidies are included; when these have been eliminated, the result is GDP at factor cost. The word *gross* indicates that deductions for depreciation of physical assets have not been made. *See also* gross national product.

gross national product (GNP)—GDP *(q.v.)* plus the net income or loss stemming from transactions with foreign countries. For Mexico, GNP is usually less than GDP because of factor payments abroad. GNP is the broadest measure of the output of goods and services by an economy. It can be calculated at market prices, which include indirect taxes and subsidies. Because indirect taxes and subsidies are only transfer payments, GNP is often calculated at factor cost by removing indirect taxes and subsidies.

International Monetary Fund (IMF)—Established along with the World Bank (*q.v.*) in 1945, the IMF is a specialized agency affiliated with the United Nations and is responsible for stabilizing international exchange rates and payments. The main business of the IMF is the provision of loans to its members (including industrialized and developing countries) when they experience balance of payments difficulties. These loans frequently carry conditions that require substantial internal economic adjustments by the recipients, most of which are developing countries.

maquiladoras—Assembly plants that are also called "in-bond" industries. Established by Mexico's Border Industrialization Program during the mid-1960s to absorb the unemployed along the border with the United States following the termination of the *bracero* program between the United States and Mexico in 1964. Machinery, equipment, and components are allowed to be imported duty-free for processing or assembly within a 20-kilometer strip along the border as long as all the imported products are subsequently reexported. End-product output from the assembly operations of the in-bond industries cannot be sold within Mexico. Except for the textile industry, in-bond industries are exempt from the "Mexicanization" requirements of Mexican majority ownership. Later legislation permitted the establishment of in-bond industries anywhere in Mexico except Mexico City, Guadalajara, and Monterrey.

parastatal—Government-owned and -managed private corporation. Corporate directors general are appointed by the president of Mexico. Although ostensibly managed semiautonomously, boards of directors are subject to the political guidelines of the government.

peso—The national currency. One peso consists of 100 centavos. Mexico maintained a fixed exchange rate of 12.49 pesos per US$1 between 1954 and 1975. In September 1976 the peso was permitted to float. The peso subsequently stabilized and fluctuated around 22.60 pesos per US$1 during the 1977–80 period. During 1981 and early 1982 the exchange rate was allowed to "crawl" to about 26 pesos per US$1 by early 1982. In February, August, and December 1982 the government was forced to devalue the peso to 31.43, 83.75, and 100.39 per US$1, respectively, in the face of a severe foreign exchange crisis. In addition to the so-called free rate of 83.75, a controlled exchange rate of 69.50 pesos per US$1 was introduced in

August 1982. In December 1982 a revised dual exchange rate system was implemented. The free rate was 100.39 pesos per US$1, and the controlled rate was set at about 68 pesos per US$1 Each of the dual exchange rates was subject to a sliding depreciation scale of 13 centavos per day. By the end of October 1984, the free rate stood at about 200 pesos per US$1, and the controlled rate was about 180 pesos per US$1.

World Bank—Informal name used to designate a group of three affiliated international institutions: the International Bank for Reconstruction and Development (IBRD), the International Development Association (IDA), and the International Finance Corporation (IFC). The IBRD, established in 1945, has the primary purpose of providing loans to developing countries for productive projects. The IDA, a legally separate loan fund but administered by the staff of the IBRD, was created in 1960 to furnish credits to the poorest developing countries on much easier terms than those of conventional IBRD loans. The IFC, founded in 1956, supplements the activities of the IBRD through loans and assistance designed specifically to encourage the growth of productive private enterprises in the less developed countries. The president and certain senior officers of the IBRD hold the same positions in the IFC. The three institutions are owned by the governments of the countries that subscribe their capital. To participate in the World Bank group, member states must first belong to the International Monetary Fund (IMF—*q.v.*).

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